User Manual

SPListX for SharePoint

SPListX for SharePoint
SPListX
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1 SPListX Introduction

About SPListX

How to purchase?

Technical support

System requirements

How to Register the software?

1.1 About SPListX

SPListX for SharePoint (SPListX) is a powerful application to export document / picture library contents and associated metadata and list items, including associated file attachments to the Windows File System. Export SharePoint libraries, folders, documents, list items, version histories, metadata and permissions to the desired destination location in the Windows File System.

SPListX supports all versions of SharePoint 2013 / 2010 / 2007 / 2003 in a single product. SPListX works with SharePoint Online in Office 365, Microsoft SharePoint Server

2013, Microsoft SharePoint Foundation 2013, Microsoft SharePoint Server 2010, Microsoft SharePoint Foundation 2010, Microsoft Office SharePoint Server 2007, Windows SharePoint Services 3.0, Microsoft SharePoint Portal Server 2003, and Windows SharePoint Services 2.0 environments.

- Export sites, lists, and document libraries and reduce data losses that might occur from hardware failures, power outages, or other problems.
- Export lists & document libraries for offline collaboration
- Archive list contents to comply with retention policies
- Archive old document versions & their metadata for regulatory compliance
- Backup SharePoint contents regularly for disaster recovery & restore procedures, if required
- Migrate documents & metadata to another DMS / ECM application
- Perform in-depth analysis of metadata in MS-Excel
- Perform the export process based on the line entries in the batch descriptor file
- Export files, list items and attachments based on SharePoint search results

Key Advantages:

- Simple solution to export folders / documents along with their associated metadata from SharePoint document libraries.
- Export list items along with their file attachments from SharePoint lists such as Tasks, Calendar, Contacts, Survey, Discussion Boards, Announcements, Links, Issue Tracking and Custom Lists.
- Export from multiple SharePoint lists to file server / network shares / local computer.
- Maintain source folder structure and version history when exporting data from the SharePoint list / document library.
- Export list items / documents / pictures based on user-defined data filters (constructed based on SharePoint columns).
- Automate export tasks through command-line or Windows Task Scheduler interface.
- Propagate original Created Date & Last Modified Date in SharePoint to the Windows File System fields for each folder / document.

1.2 How to purchase?

You can purchase SPListX for SharePoint online from our website http://www.vyapin.com/. Please contact our Sales department at sales@vyapin.com for sales and price related queries.

1.3 Technical Support

Please send all Technical Support questions to support@vyapin.com.

Please send us the following additional information if you are reporting a problem:

1) Versions of SPListX that you are evaluating or you have registered with us. Version information could be found in the "About" Screen and in "Help".

2) Additional services or resource consuming processes/applications (like anti-virus) running in the background on SPListX installed machine as well as the source Microsoft SharePoint Server 2013 / 2010, Microsoft SharePoint Foundation 2013 / 2010 / MOSS / WSS and destination.

3) Hardware configuration of the machine where SPListX and Microsoft SharePoint Server 2013 / 2010, Microsoft SharePoint Foundation 2010 / MOSS / WSS is installed.

4) 'Service Pack' version of Windows Server & Microsoft SharePoint Server 2013 / 2010, Microsoft SharePoint Foundation 2013 / 2010 / MOSS / WSS running currently.

5) Send us the "SPListXErrorLog.txt" available in the common application data path of SPListX (e.g., *<Application Data Folder> \SPListX\Log\SPListXErrorLog.txt).*

6) SPListX error logs and activity log files (ActivityLog.txt, ActivityErrors.txt,

MetadataErrors.txt and SPlistXErrorLog.txt) stored in the Common application data path. For example: *<Application Data Folder>\SPListX\TaskHistory\<taskname>\<timestamp>.*

NOTE: <Application Data Folder> is the common location where SPListX tasks and task history is stored in the computer running SPListX application. The **<Application Data Folder>** can be found from the **Help -> About** screen. The default path of ***<Application Data Folder>*** is as follows:

a) Windows Server 2003 - C:\Documents and Settings\All Users\Documents

b) Windows 8 / 7, Windows Server 2012 / 2008 - C:\Users\Public\Documents

1.4 System requirements

Hardware: Intel Pentium processor, 10 MB disk space to install SPListX

Software: Windows 8 / 7 (or) Windows Server 2012 / 2008 / 2003 with the latest service packs and .NET Framework 4.5 or higher.

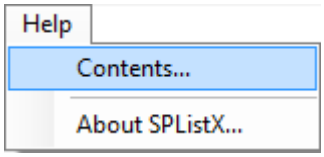
To work with SharePoint Online in Office 365, Windows 8 / 7 (or) Windows Server 2012 / 2008 R2 with the latest service packs and .NET Framework 4.5 or higher is recommended.

1.5 How to Register the Software?

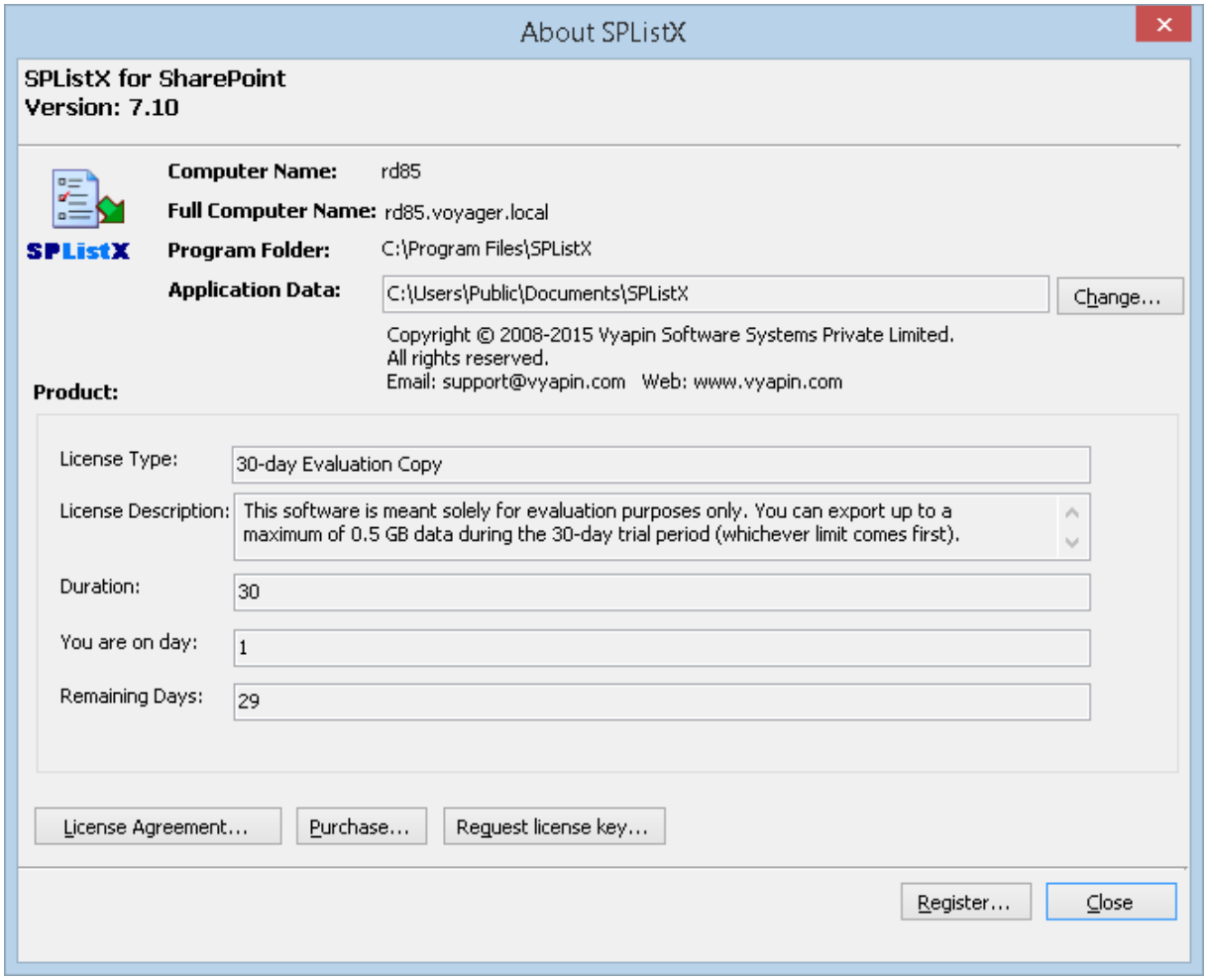
Once you purchase the software online or through any one of our resellers, you will receive a sale notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to activate the software.

Alternately, you can request the product license key by filling up the form shown in the steps given below.

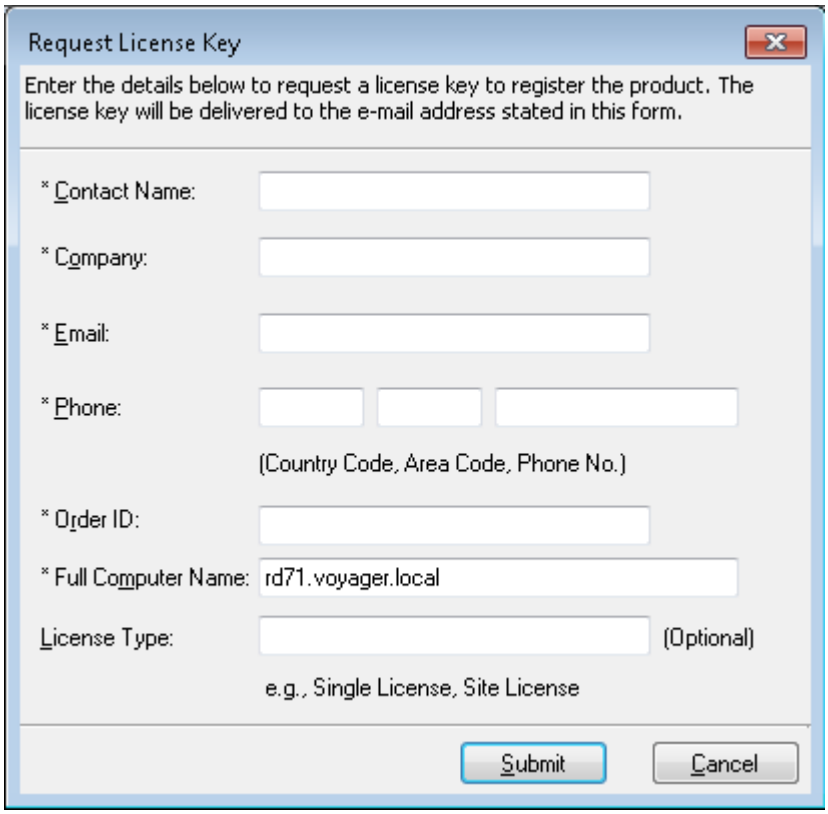
1. Select **About SPListX** from Help menu



2. The About SPListX dialog appears as shown below:


About SPListX
SPListX for SharePoint
Version: 7.10
SPListX
Computer Name: rd85
Full Computer Name: rd85.voyager.local
Program Folder: C:\Program Files\SPListX
Application Data: C:\Users\Public\Documents\SPListX
Change...
Copyright © 2008-2015 Vyapin Software Systems Private Limited.
All rights reserved.
Email: support@vyapin.com Web: www.vyapin.com
Product:
License Type: 30-day Evaluation Copy
License Description: This software is meant solely for evaluation purposes only. You can export up to a maximum of 0.5 GB data during the 30-day trial period (whichever limit comes first).
Duration: 30
You are on day: 1
Remaining Days: 29
License Agreement...
Purchase...
Request license key...
Register...
Close

3. Click Request License Key... button, the Request license Key dialog will appear as shown below:


Request License Key
Enter the details below to request a license key to register the product. The license key will be delivered to the e-mail address stated in this form.
* Contact Name:
* Company:
* Email:
* Phone:
(Country Code, Area Code, Phone No.)
* Order ID:
* Full Computer Name:
rd71.voyager.local
License Type:
(Optional)
e.g., Single License, Site License
Submit
Cancel

Contact Name: End-user of the product.

Company: End-user Company Name.

Email: Email address where the license key has to be sent.

Phone: Phone number with country code and area code.

Order ID: Order/Transaction ID reference.

License Type: License that was purchased.

Please allow 12 to 24 hours from the time of purchase for our sales department to process your orders.

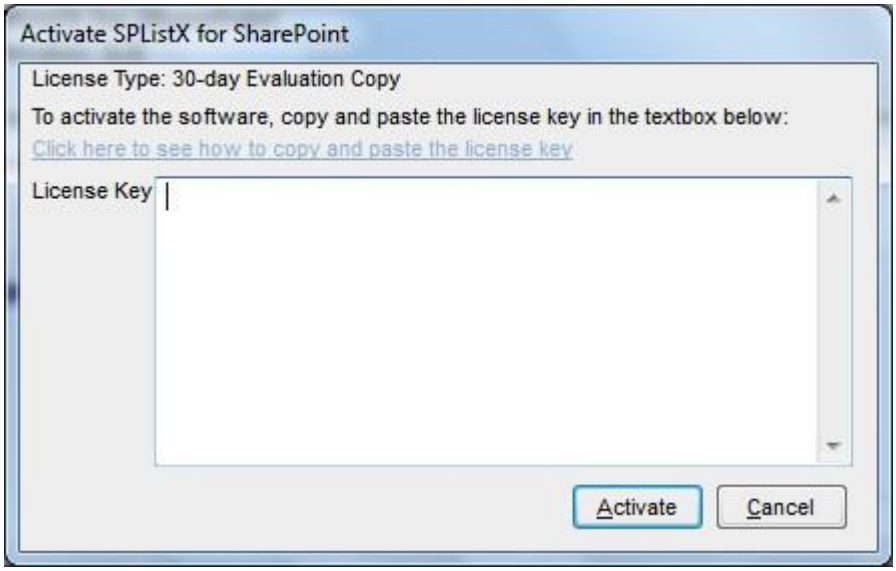

Activate SPListX for SharePoint
License Type: 30-day Evaluation Copy
To activate the software, copy and paste the license key in the textbox below:
Click here to see how to copy and paste the license key
License Key
Activate
Cancel

Image 1 - Activate screen

Perform the following steps to activate the software:

1) Download evaluation/trial copy of software from the respective product page available in our website at http://www.vyapin.com/ **2)** Install the software on the desired computer.

3) You will receive a license key through e-mail as soon as the purchase process is complete.

4) Click 'Activate' in Help -> About -> Activate menu to see the Activate dialog (as shown in Image 1).

5) Please Copy the license key sent to you through email, and pastes it in the 'License Key' textbox. For help on how to copy the license key, click 'Click here to see how to copy and paste the license key' link in the Activate dialog (as shown in Image 2).

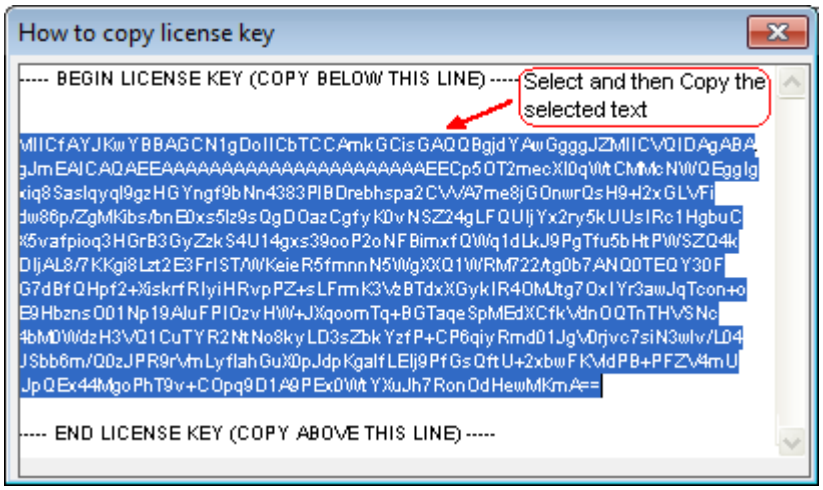


Image 2 - How to copy license key screen

2 SPListX Features

Task Manager

Change Application Data folder location

Create new task

Edit an existing task

Copy an existing task

Delete an existing task

Run a task

Run a task from command line

Create Windows Task

Task status

Task history

Profile Manager

Manage favorites

Manage categories

Active Directory Profile Manager

Metadata Format Template

File Share Manager

Remove a task history item

Cleanup history

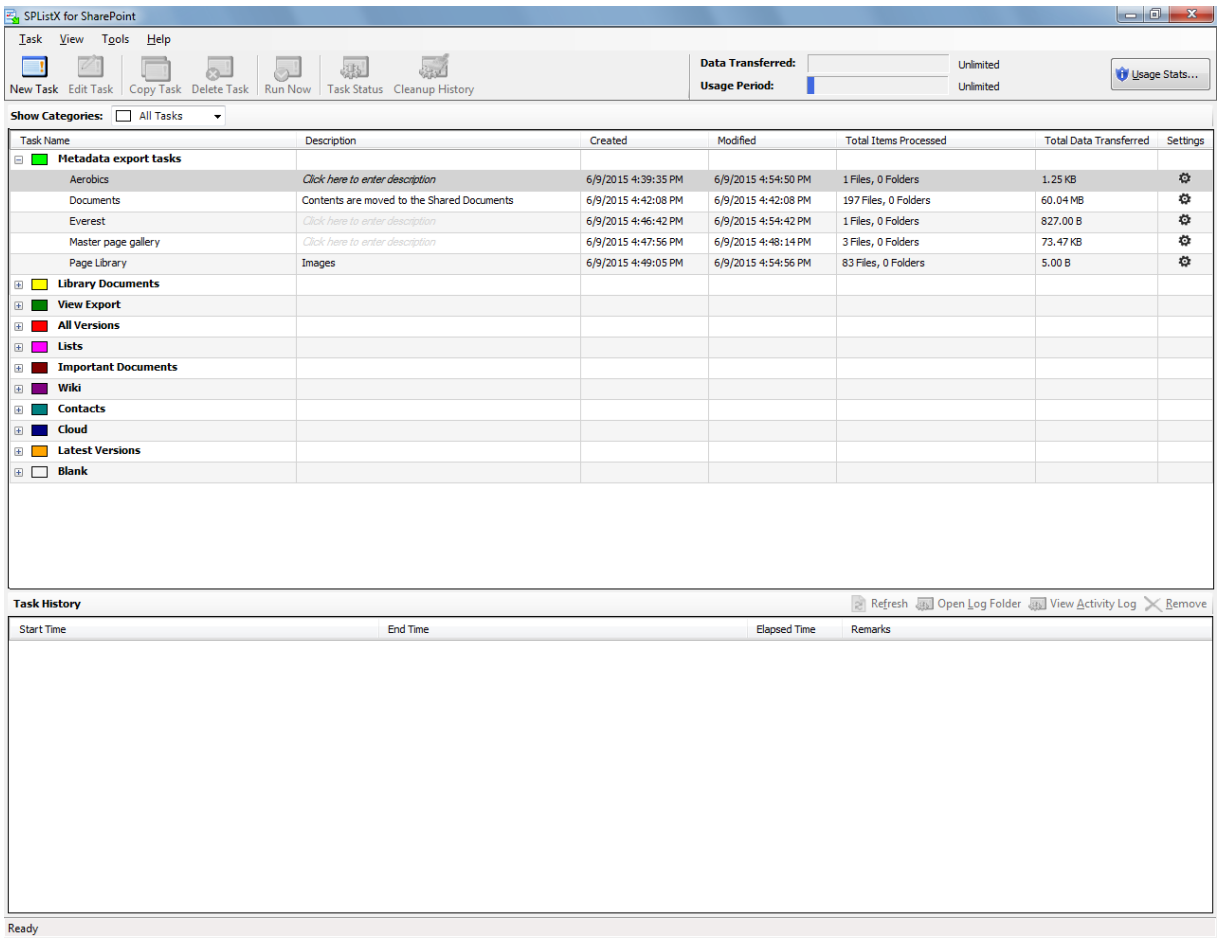
Proxy server settings

Web single signon dashboard

View activity log

2.1 Task Manager

SPListX creates export tasks for export process setup to export documents, list items and metadata from SharePoint to file system. SPListX Task Manager in the main application window will help you manage SPListX export tasks and their corresponding task history. SPListX Task Manager provides menu and tools to work with the tasks easily.


SPListX for SharePoint
Task View Tools Help
New Task Edit Task Copy Task Delete Task Run Now Task Status Cleanup History
Data Transferred: Unlimited
Usage Period: Unlimited
Usage Stats...
Show Categories: All Tasks
Task Name Description Created Modified Total Items Processed Total Data Transferred Settings
Metadata export tasks
Aerobics Click here to enter description 6/9/2015 4:39:35 PM 6/9/2015 4:54:50 PM 1 Files, 0 Folders 1.25 KB
Documents Contents are moved to the Shared Documents 6/9/2015 4:42:08 PM 6/9/2015 4:42:08 PM 197 Files, 0 Folders 60.04 MB
Everest Click here to enter description 6/9/2015 4:46:42 PM 6/9/2015 4:54:42 PM 1 Files, 0 Folders 827.00 B
Master page gallery Click here to enter description 6/9/2015 4:47:56 PM 6/9/2015 4:48:14 PM 3 Files, 0 Folders 73.47 KB
Page Library Images 6/9/2015 4:49:05 PM 6/9/2015 4:54:56 PM 83 Files, 0 Folders 5.00 B
Library Documents
View Export
All Versions
Lists
Important Documents
Wiki
Contacts
Cloud
Latest Versions
Blank
Task History
Refresh Open Log Folder View Activity Log Remove
Start Time End Time Elapsed Time Remarks
Ready

SPListX Task Manager contains a standard menu bar and toolbar along with two panes to manage SPListX export task effectively:

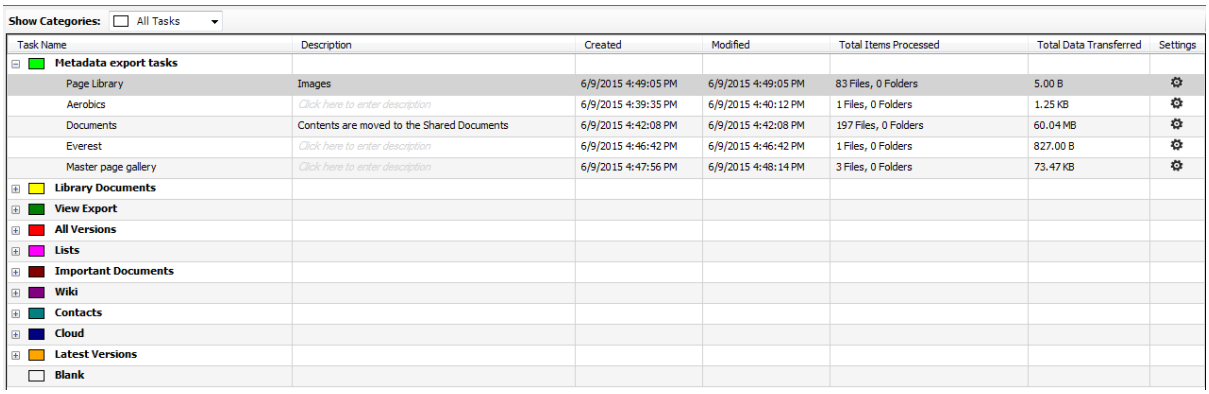
1) **Task List pane**
2) **Task History pane**

Standard menu bar and toolbar

Standard menu bar and toolbar contain all the commands (or actions) to work with a SPListX export task.

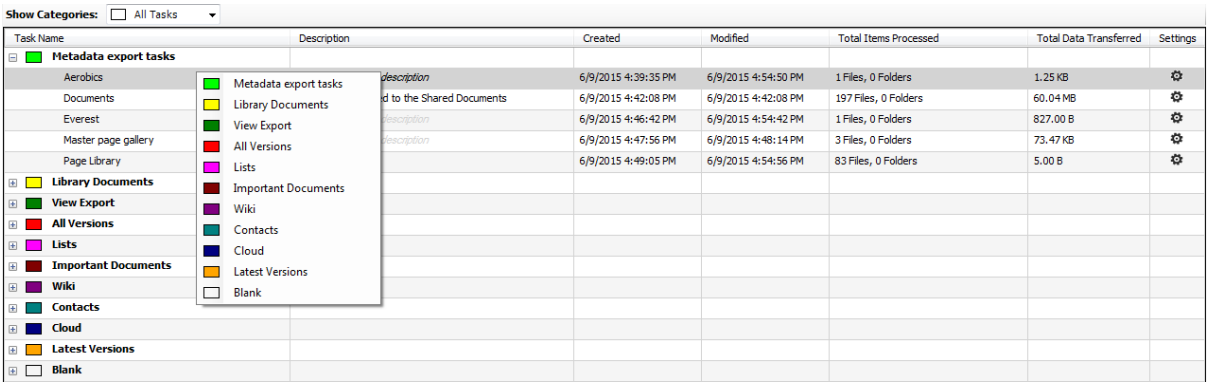
Task List:

Task List pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. It provides information about task such as Description, Created Date, Modified Date, Total Items Processed, Total Data Transferred and Settings for each task. The information about category will be displayed on Show Categories. The default selection on category list is **All Tasks** which shows all the created tasks under corresponding category. The default category is **Blank**.

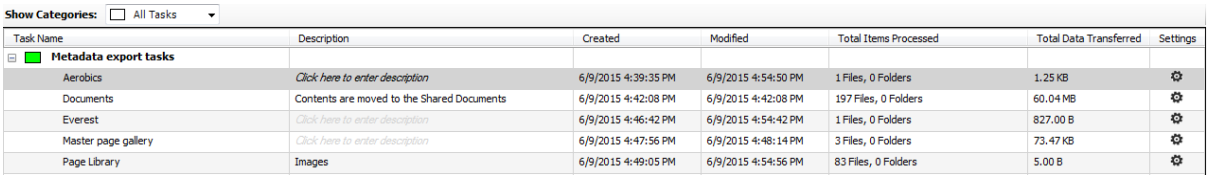


The Settings of the task has been displayed when click the settings image which is at the last column of each task.

The selected tasks can be re-categorized by right clicking on a task.

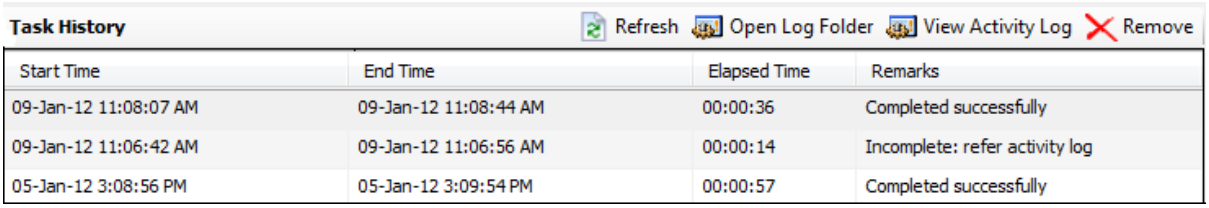


The Show Categories field helps you view only the tasks available in the selected category.



Task History:

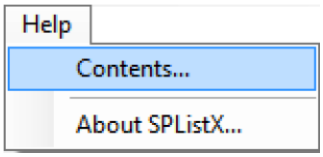
Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.


Task History
Refresh
Open Log Folder
View Activity Log
Remove
Start Time
End Time
Elapsed Time
Remarks
09-Jan-12 11:08:07 AM
09-Jan-12 11:08:44 AM
00:00:36
Completed successfully
09-Jan-12 11:06:42 AM
09-Jan-12 11:06:56 AM
00:00:14
Incomplete: refer activity log
05-Jan-12 3:08:56 PM
05-Jan-12 3:09:54 PM
00:00:57
Completed successfully

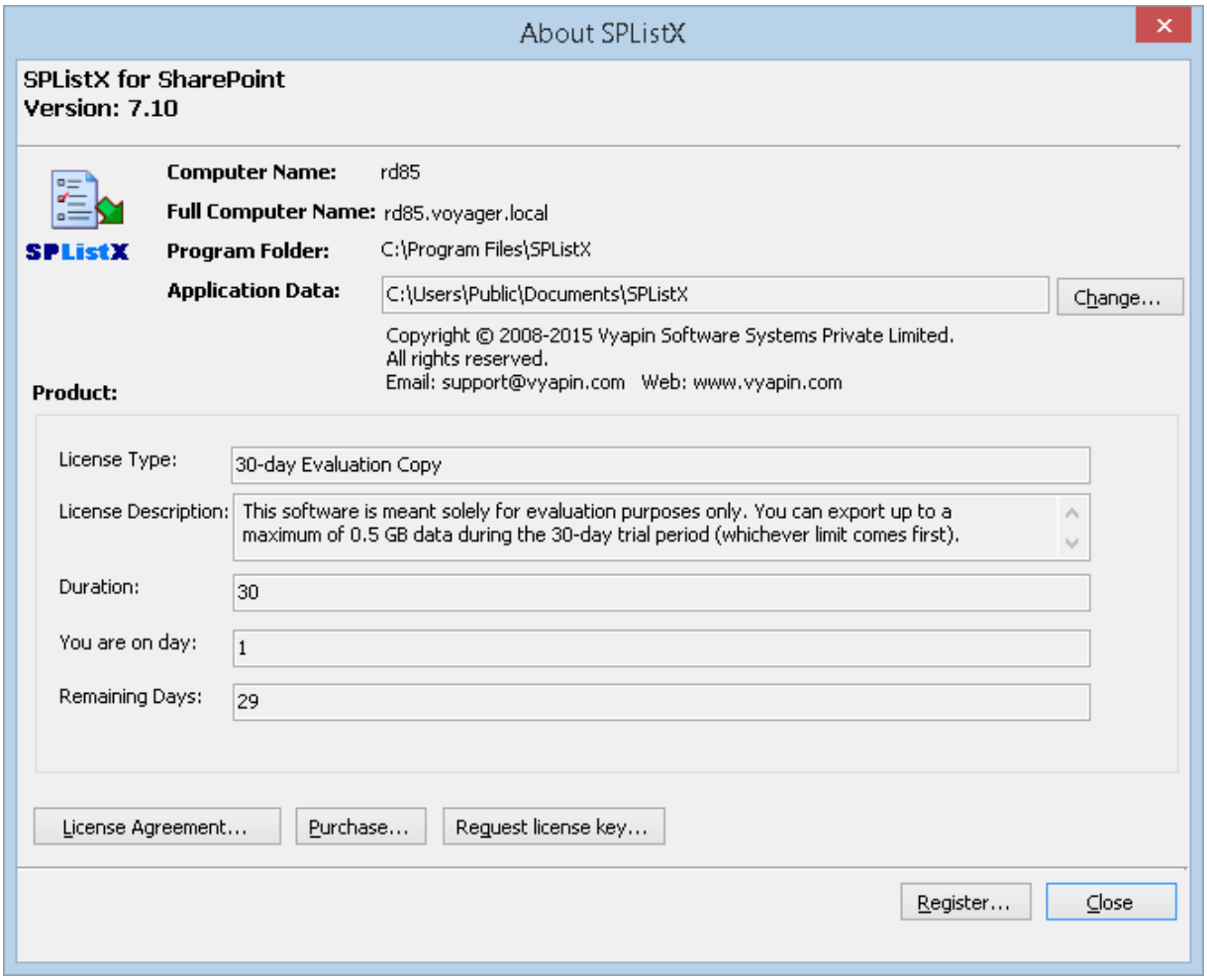
2.2 Change Application Data Folder Location

SPListX enables you to change **Application Data** folder location, where SPListX export tasks and related settings, activity logs and error logs are stored, at any time after installing SPListX software. To change the Application Data folder location, perform the following steps given below:

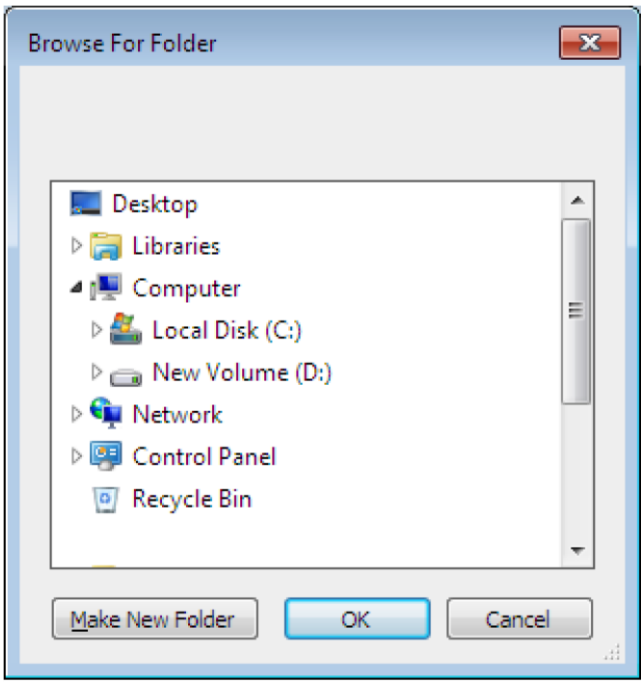
1) Select **About SPListX** from **Help** menu



2) The **About SPListX** dialog appears as shown below:

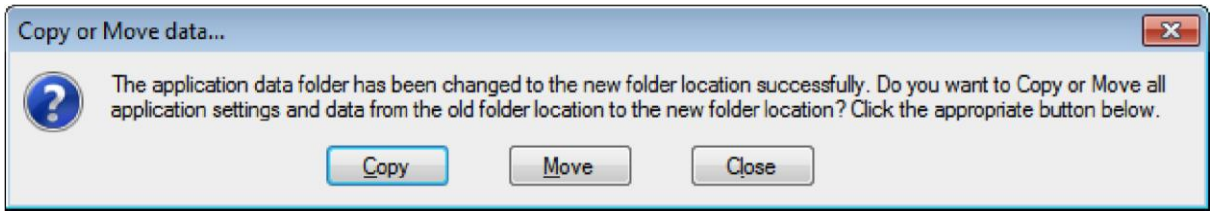

About SPListX
SPListX for SharePoint
Version: 7.10
SPListX
Computer Name: rd85
Full Computer Name: rd85.voyager.local
Program Folder: C:\Program Files\SPListX
Application Data: C:\Users\Public\Documents\SPListX
Change...
Copyright © 2008-2015 Vyapin Software Systems Private Limited.
All rights reserved.
Email: support@vyapin.com Web: www.vyapin.com
Product:
License Type: 30-day Evaluation Copy
License Description: This software is meant solely for evaluation purposes only. You can export up to a maximum of 0.5 GB data during the 30-day trial period (whichever limit comes first).
Duration: 30
You are on day: 1
Remaining Days: 29
License Agreement...
Purchase...
Request license key...
Register...
Close

3) Click **Change...** button to change **Application Data** folder location of SPListX application. The **Browse for Folder** location dialog will appear as shown below:



4) Select a desired folder location and Click **OK.** The folder location can be local drives or mapped network drives.

5) SPListX provides an option to copy or move the existing SPListX application settings (SPListX export task settings, task histories, activity logs, error logs etc.) to the new location once you change the Application Data Folder. Once you specify the new Application Data folder location, SPListX will prompt you to copy or move existing SPListX application settings to the new location as shown below:


Copy or Move data...
The application data folder has been changed to the new folder location successfully. Do you want to Copy or Move all application settings and data from the old folder location to the new folder location? Click the appropriate button below.
Copy
Move
Close

6) Click the desired action **(Copy / Move / Close)** to proceed. SPListX will use the new Application Data folder location henceforth.

2.3 Create new Task

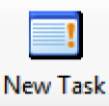
You can create a task to export folders, files, list items including attachments along with their metadata from SharePoint list to file system or network share. SPListX facilitates exporting files, list item attachments and its associated metadata from SharePoint list using the following export methods (or task types):

A. **Export SharePoint List contents using the browse option:** Export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.

B. **Export SharePoint List contents using a batch descriptor file:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.

C. **Export SharePoint List contents using the search option:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint search results.

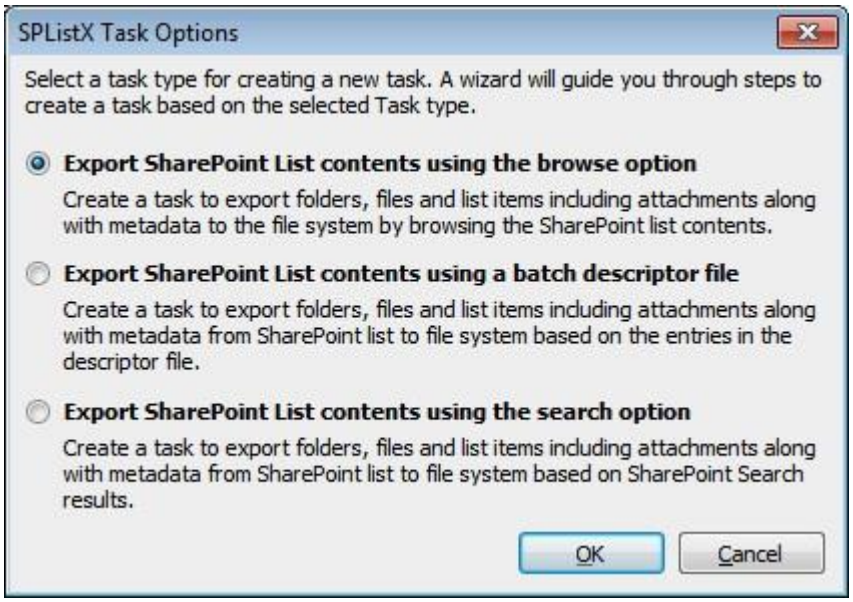
1) Click **New Task** from SPListX main screen.



Or Select **New Task** from **Task** menu

Or Press **Ctrl+N**

2) Select a task type in **New Task** dialog and click **OK.**


SPListX Task Options
Select a task type for creating a new task. A wizard will guide you through steps to create a task based on the selected Task type.
Export SharePoint List contents using the browse option
Create a task to export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
Export SharePoint List contents using a batch descriptor file
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
Export SharePoint List contents using the search option
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint Search results.
OK
Cancel

a) Create a task to **Export SharePoint List contents using the browse option**

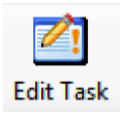
b) Create a task to **Export SharePoint List contents using a batch descriptor file**

c) Create a task to **Export SharePoint List contents using the search option**

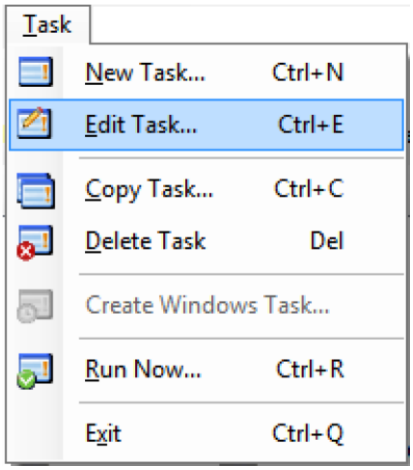
2.4 Edit an existing task - Edit Task

To edit an existing task:

1) Select a task in the **Task List** pane.
2) Click **Edit Task** from SPListX main screen.



Or Select **Edit Task** from **Task** menu



Or Press **Ctrl+E**

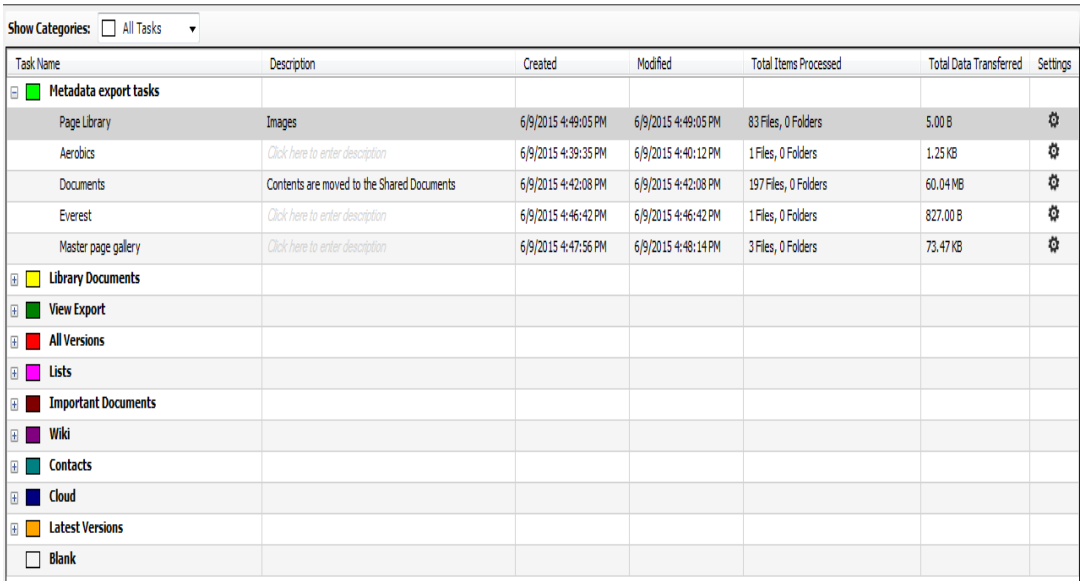
3) **SPListX Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

   a) Edit **Export SharePoint List contents using the browse option**
   b) Edit **Export SharePoint List contents using a batch descriptor file**
   c) Edit **Export SharePoint List contents using the search option**

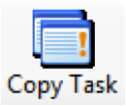
2.5 Copy an existing task

To copy or create a new task from an existing SPListX export task:

1) Select a task from the **Task List** pane.

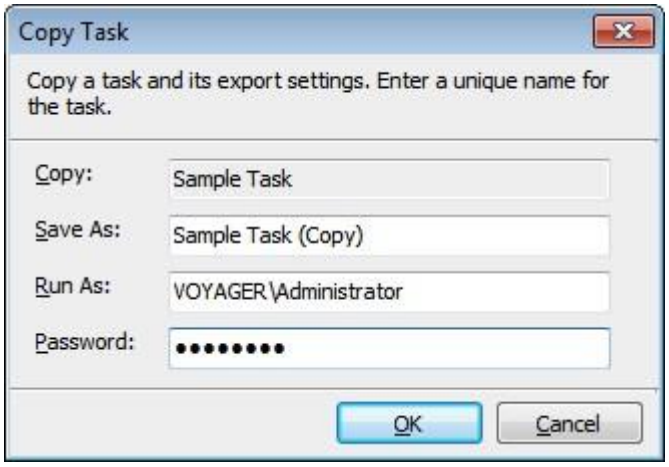


2) Click **Copy Task** from SPListX main screen.



Or Select **Copy Task** from **Task** menu

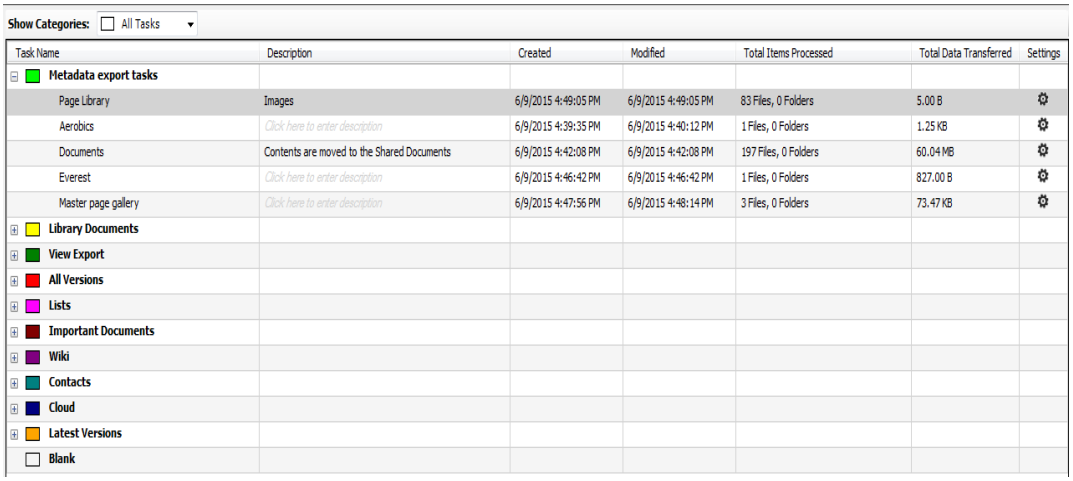
3) In **Copy Task** dialog, enter a new task name in **Save As** text-box; specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same export settings specified in the selected task.



2.6 Delete an existing task

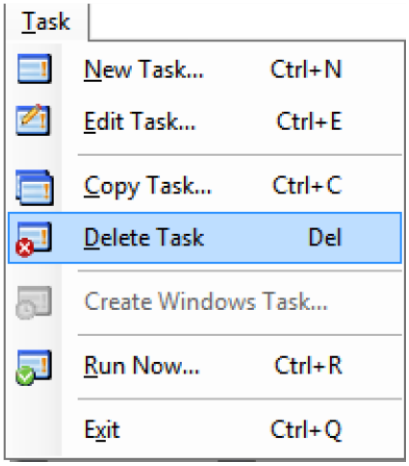
To delete a SPListX export task:

1) Select a task from **Task List** pane.



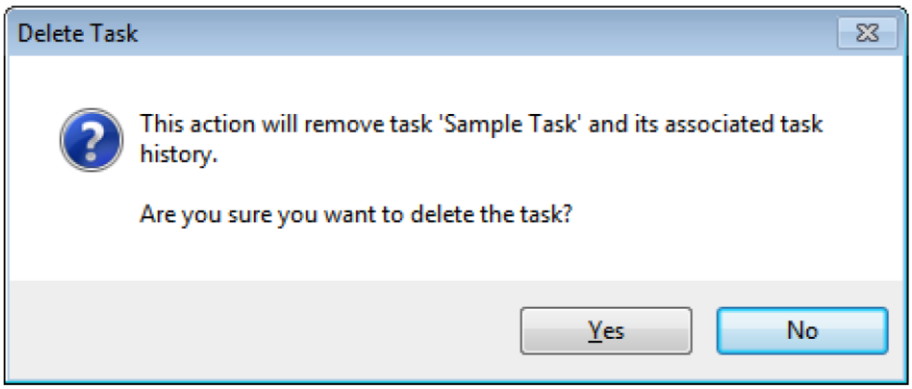
2) Click **Delete Task** from SPListX main screen.

Or Select **Delete Task** from **Task** menu



Or Press **Del** key

Click **Yes** in **Delete Task** message-box shown below:

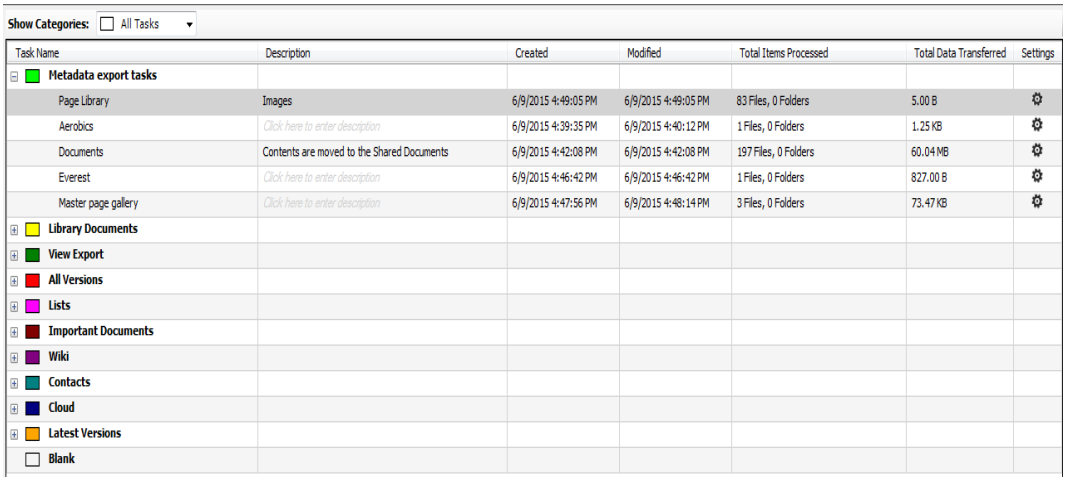

Delete Task
This action will remove task 'Sample Task' and its associated task history.
Are you sure you want to delete the task?
Yes
No

NOTE: Deleting a task will permanently delete the selected task and its task history items.

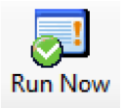
2.7 Run a task

SPListX 'Run Now' feature allows the user to instantiate a task anytime after the task has been created. To run a SPListX export task:

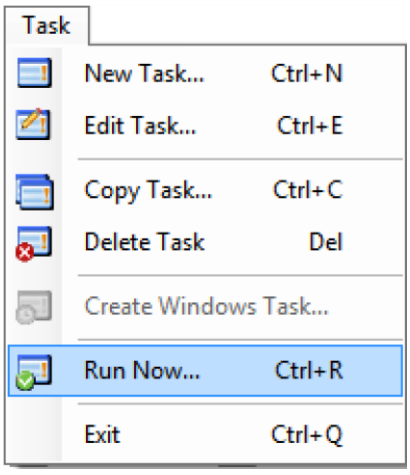
1) Select a task from **Task List** pane.



2) Click **Run Now** from SPListX main screen.

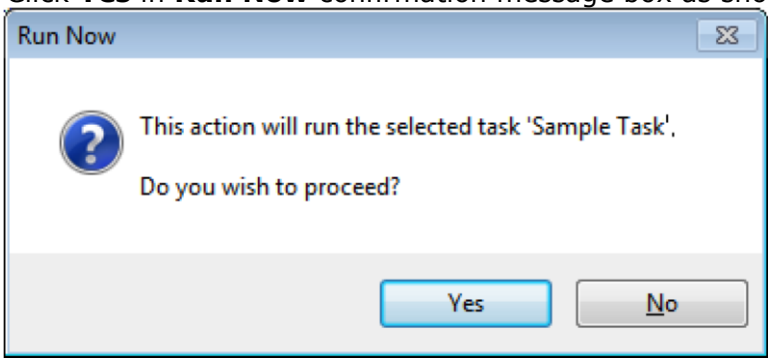


Or Select **Run Now** from **Task** menu

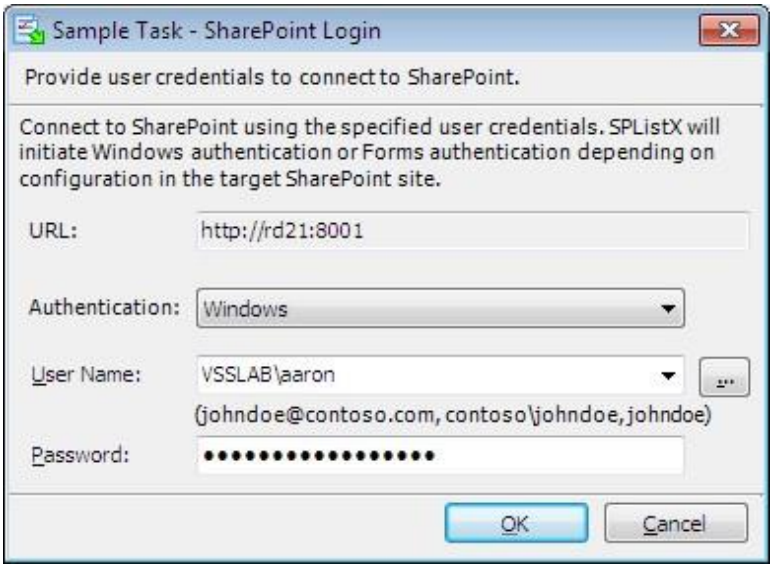


Or Press **Ctrl+R** Key

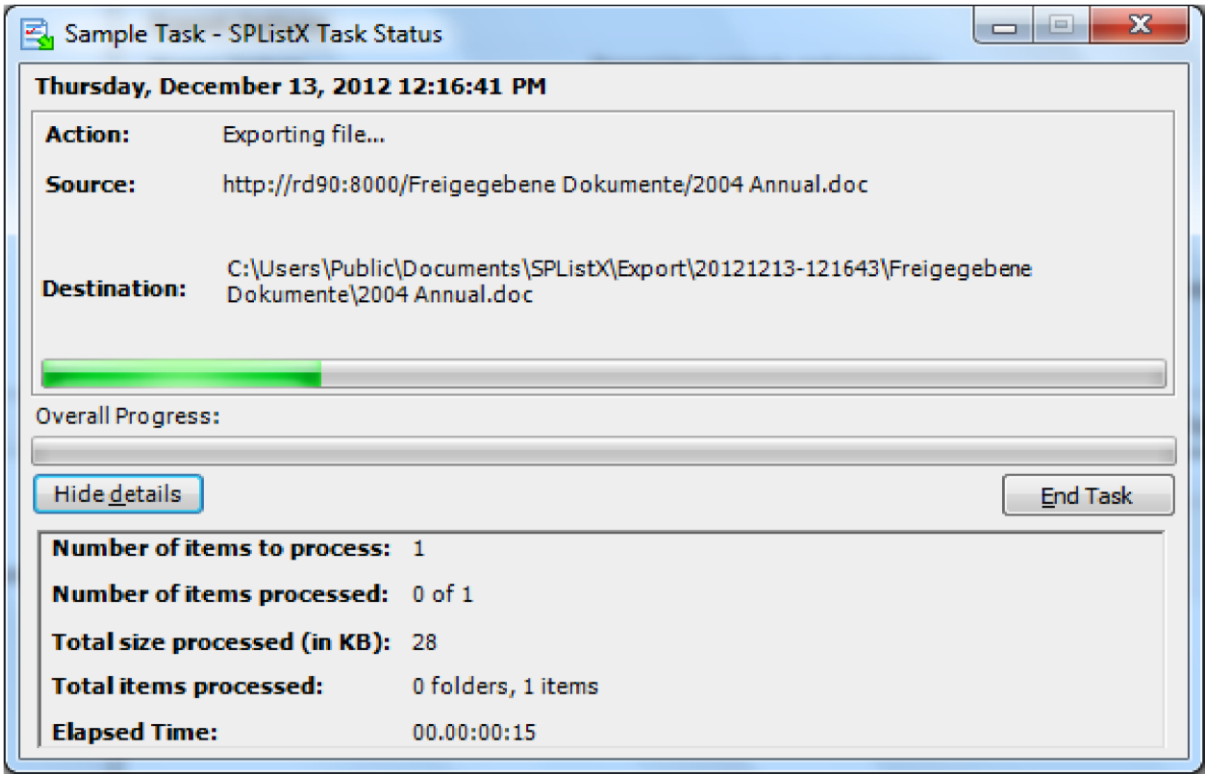
Click **Yes** in **Run Now** confirmation message box as shown below:



4) The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



5) The current process of task will be reported in a new dialog as shown below:



Runtime Statistics:

a) **Number of items to process -** Shows the total number of line items to process in the current export task. This represents the number of items selected by the user in the browse mode or number of line items to process in the batch file.

b) **Number of items processed -** Shows the number of line items that have been processed at any given instance.

c) **Total size processed (in KB) -** Shows the total size of files that were exported from SharePoint at any given instance, including documents, version history, and file attachments.

d) **Total items processed -** Shows the number of folders and items (documents & list items) exported from SharePoint at any given time instance. The count does not include version histories and file attachments.

e) **Elapsed Time -** Shows the elapsed time from the instance the export task started or commenced.

Once the export task is complete, a new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

2.8 Run a Task from Command Line

SPListX command line feature allows the user to instantiate a task from DOS command prompt any time after an export task has been created using SPListX' s task wizard.

To run a SPListX export task from command line:

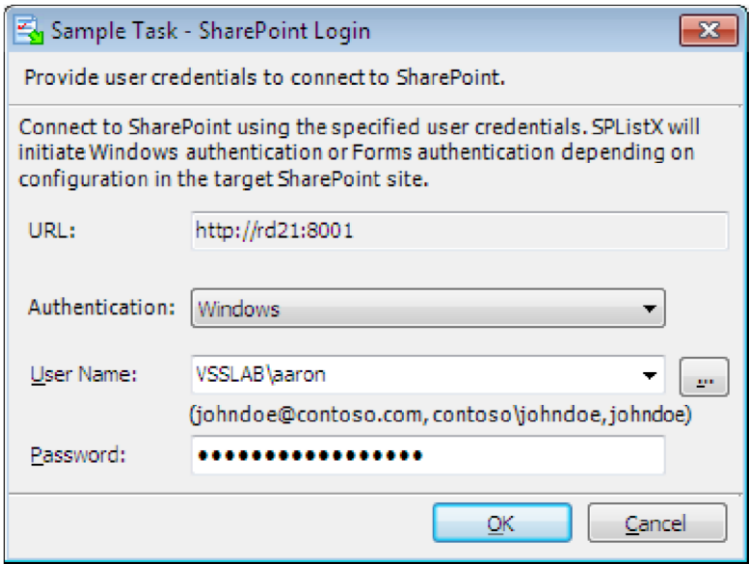
1) **Usage:**

SPListX TaskRunner <task name> [/profile: user name**] [/u:** user name**] [/p:** password**] [/noprompt]**

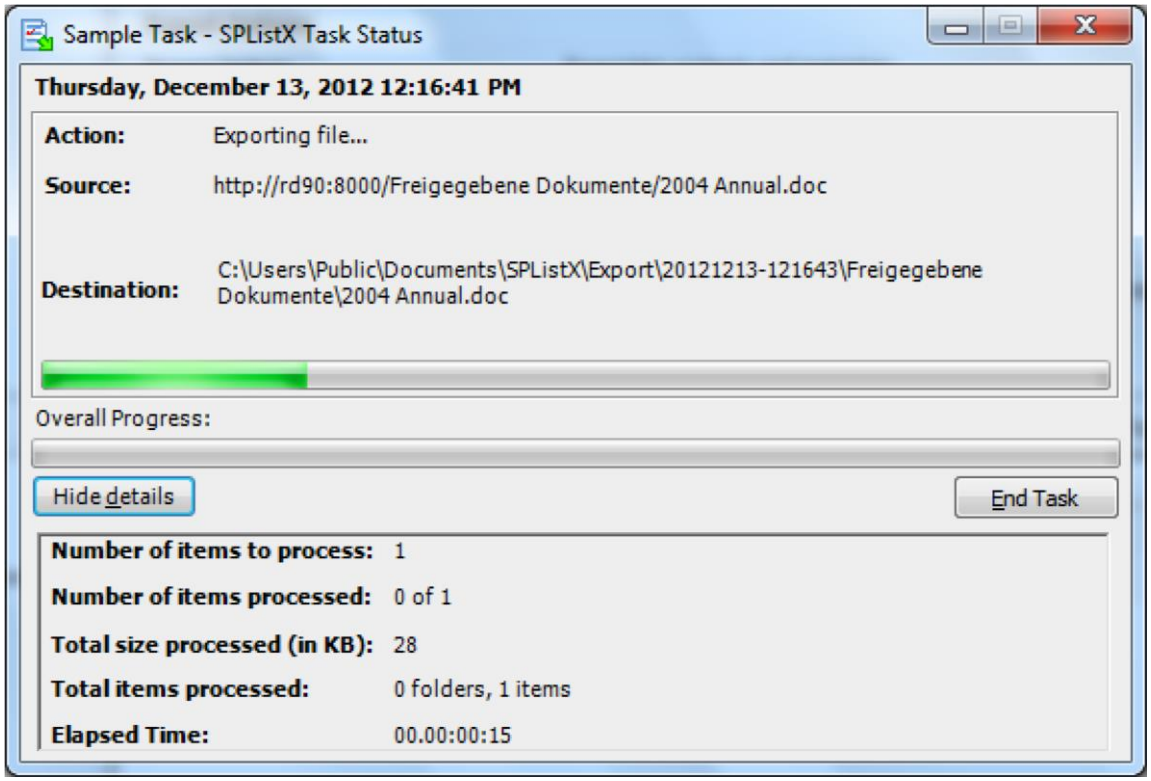
Where,

SPListX TaskRunner	Name of the SPListX Task Runner application, Specify absolute path where the SPListX TaskRunner located. For example: C:\Program Files\SPListX\SPListX TaskRunner
Task name:	Name of the SPListX Task to run from DOS command prompt, enclose the task name in double quotes. For example: "Sample Task1"
/Profile	Denotes profile name stored in the current user context using SPListX' s Profile Manager, in which SPListX task must be run. Enclose the user name in double quotes. For example: "/profile: voyager \admin user" "/profile: Contoso\johndoe" "/profile:johndoe@contoso.com" "/profile: johndoe"
/u	Denotes user name context in which SPListX task must be run in the *domain**username* format. Enclose the user name in double quotes. For example: "/voyager\administrator" "/u: Contoso\johndoe" "/u:johndoe@contoso.com" "/johndoe"
/p	Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes. For example: "/p: 2ab45fb"
/noprompt	This optional flag suppresses SPListX's login dialog prompt to enter user credentials to connect to SharePoint

2) If /**noprompt** flag is not used, then the **Credential Dialog** will appear as shown below. The given credential will be used to connect to SharePoint.



3) The export task will be reported in a new dialog as shown below:



Runtime Statistics:

a) **Number of items to process -** Shows the total number of line items to process in the current export task. This represents the number of items selected by the user in the browse mode or number of line items to process in the batch file.

b) **Number of items processed -** Shows the number of line items that have been processed at any given instance.

c) **Total size processed (in KB) -** Shows the total size of files that were exported from SharePoint at any given instance, including documents, version history, and file attachments.

d) **Total items processed -** Shows the number of folders and items (documents & list items) exported from SharePoint at any given time instance. The count does not include version histories and file attachments.

e) **Elapsed Time -** Shows the elapsed time from the instance the export task started or commenced.

4) Once the export task is complete, click **Refresh** button available in Task History pane in SPListX main application. A new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

Examples of invoking an export task from the command prompt:

C:\Program Files\SPListX> SPListXTaskRunner "mytask1" "/u: voyager\administrator" "/p: 2az" /noprompt

C:\Program Files\SPListX>SPListXTaskRunner "Sample Task1" "/u: voyager\adminuser" "/p: 2az$%&" /noprompt

C:\Program Files\SPListX> SPListXTaskRunner "Sample Task2" "/profile: voyager\adminuser" /noprompt

D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u: voyager\adminuser" "/p: 2az$%&" /noprompt

D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u: voyager\adminuser" "/p: 2az$%&" /noprompt

5) For import tasks configured with SharePoint Online sites using Web Single Signon credential, only task name has to be provided as input as shown below. Other optional parameters except "/noprompt" are ignored for this authentication type.
C:\Program Files\SPListX> SPListXTaskRunner "Office 365 import" /noprompt

6) DOS batch file examples:

- To execute SPListX task one by one from a batch file:

"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task1" "/u:johndoe@contoso.com" "/p: test" /noprompt

"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task2" "/u: voyager\adminuser" "/p: 2az$%&" /noprompt

"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u:johndoe@contoso.com" "/p: test" /noprompt

"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task4" "/profile:johndoe@contoso.com" /noprompt

- To execute multiple SPListX tasks simultaneously:

Start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task1" "/u: voyager\user1" "/p: ctest1" /noprompt
Start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task2" "/u: voyager\user2" "/p: ctest2" /noprompt

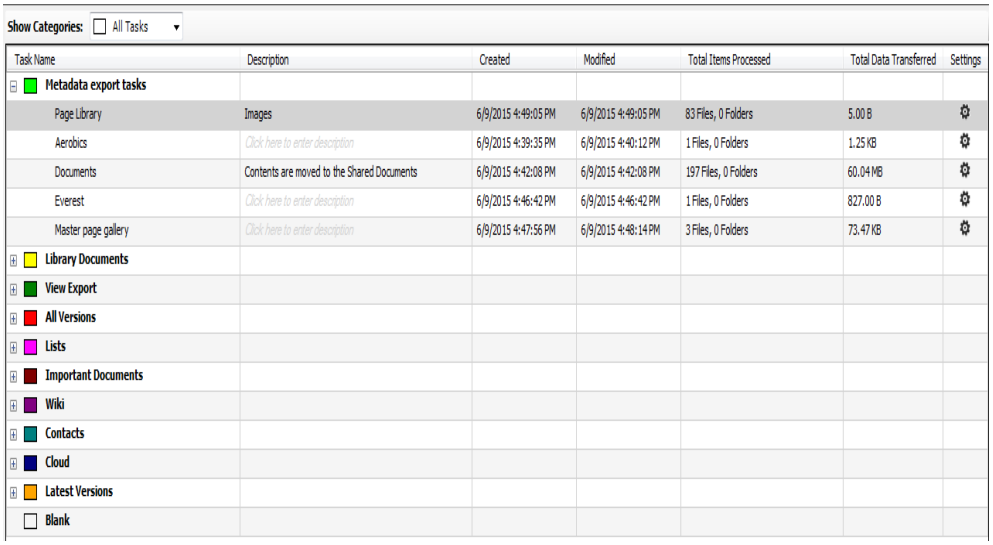
2.9 Create Windows Task

Use this tool to create a Windows Task in Windows Task Scheduler interface to automatically run the export tasks at scheduled intervals.

This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

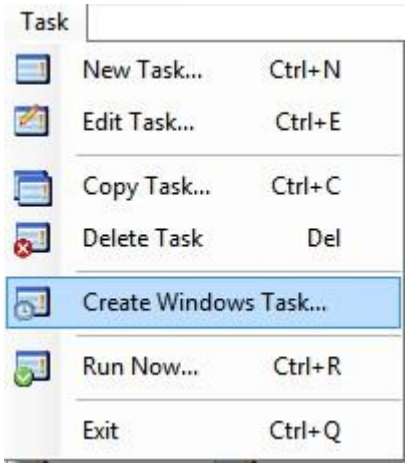
- To create Windows Schedule Task that was accidentally deleted and is required to be created again with the same schedule settings
- To create Windows Schedule Task when the SPListX export tasks are migrated from an old machine to a new machine

1) Select a task from the **Task List** pane

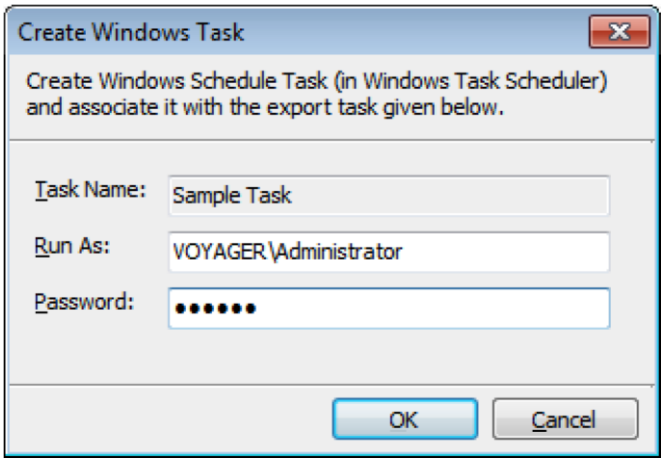


2) If SPListX has enough information about the required Windows Schedule Task, the **Create Windows Task** option will be enabled.

Select **Create Windows Task** from **Task** menu



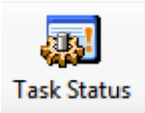
3) In **Create Windows Task** dialog, specify a **Run As** account and **Password** and Click **OK** to create a new schedule task with the same schedule settings that was previously saved by SPListX Export Task Wizard.


Create Windows Task
Create Windows Schedule Task (in Windows Task Scheduler) and associate it with the export task given below.
Task Name: Sample Task
Run As: VOYAGER\Administrator
Password: ••••••
OK
Cancel

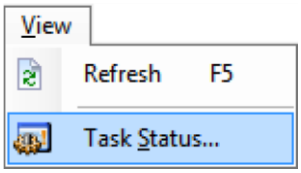
2.10 Task Status

To view and manage task status of a selected task:

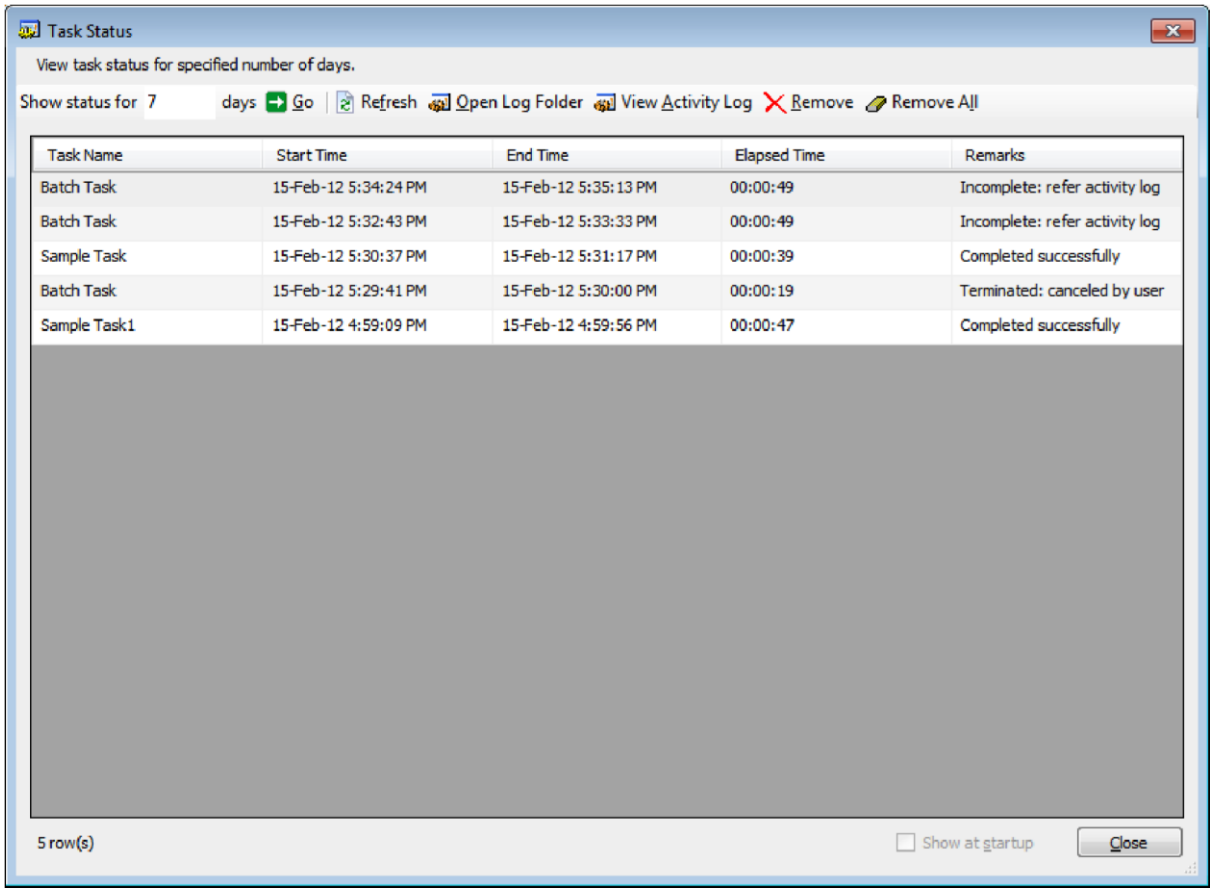
1) Click **Task Status** from SPListX main screen.



Or Select **Task Status** from **Tools** menu



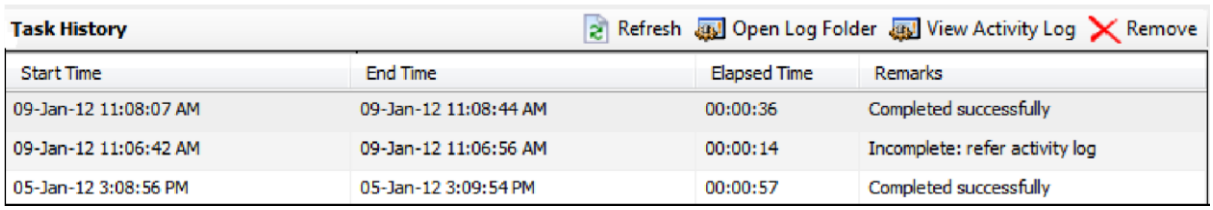
2) The **Task Status** dialog appears as shown below:


Task Status
View task status for specified number of days.
Show status for 7 days Go Refresh Open Log Folder View Activity Log Remove Remove All
Task Name | Start Time | End Time | Elapsed Time | Remarks
Batch Task | 15-Feb-12 5:34:24 PM | 15-Feb-12 5:35:13 PM | 00:00:49 | Incomplete: refer activity log
Batch Task | 15-Feb-12 5:32:43 PM | 15-Feb-12 5:33:33 PM | 00:00:49 | Incomplete: refer activity log
Sample Task | 15-Feb-12 5:30:37 PM | 15-Feb-12 5:31:17 PM | 00:00:39 | Completed successfully
Batch Task | 15-Feb-12 5:29:41 PM | 15-Feb-12 5:30:00 PM | 00:00:19 | Terminated: canceled by user
Sample Task1 | 15-Feb-12 4:59:09 PM | 15-Feb-12 4:59:56 PM | 00:00:47 | Completed successfully
5 row(s)
Show at startup
Close

3) **Show status for <n> days:** Upon clicking **Go** button, displays task history entries of all tasks that were run within the specified number of days.
4) **Refresh:** Reloads the task history entries and updates the newly run tasks (if any).
5) **View activity log:** Displays activity log of the currently selected task history item.
6) **Remove:** Removes the currently selected task history entry and its associated log folders and files.
7) **Remove all:** Removes all task history entries and their associated log folders and files that are currently displayed.
8) Click **Close** button to close this window.

2.11 Task History

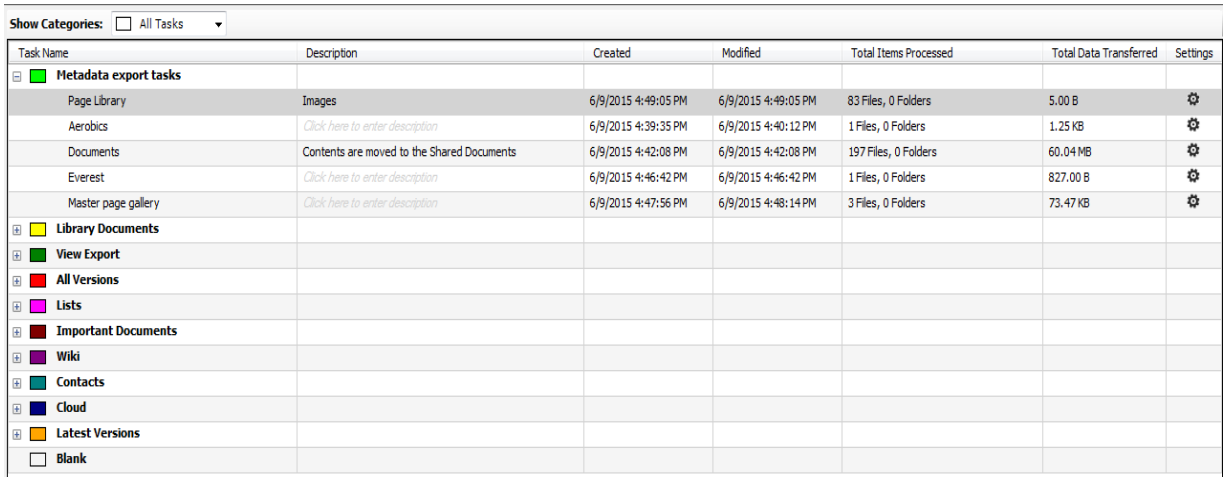
When an export task is run in SPListX, the task export information is maintained in the 'TaskHistory' folder. The task history information can be seen at bottom of SPListX application's main window.

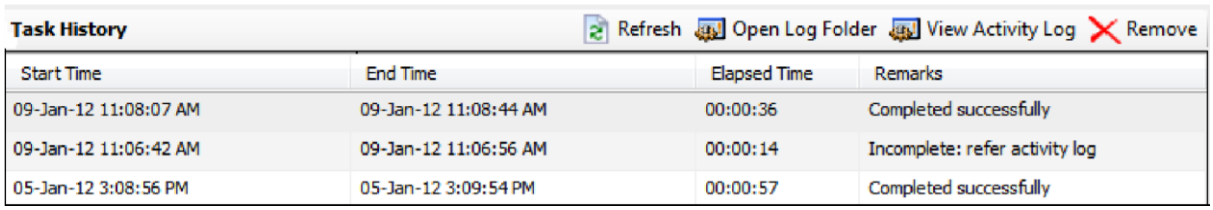


To view task history of a particular task:

1) Select a task from **Task List** pane.

2) The history of task will be displayed at bottom of SPListX main window as shown below.





Where

Start Time -> Date and Time a task was initiated.

End Time -> Date and Time a task completed its export process

Elapsed Time -> Total time (hh:mm:ss) a task has taken to complete its export process.

Remarks -> Brief remark about the status of export.

Possible Remarks	Description
Completed Successfully	Export process was completed successfully without any errors
Incomplete: refer activity log	Export process encountered certain errors as described in the activity log
Incomplete: Eval limit reached	Export process reached the maximum allowed number of files to export in evaluation / trial version. This message is applicable for evaluation / trial version only.
Terminated: Cancelled by User	Export Process was cancelled by the User.
Terminated abnormally	The Export Process was abnormally terminated or killed.
Failed: the following error occurred while creating activity log.	The export process could not be initiated as there were issues in creating the activity log files and initiating the export process.

The following operations can be performed on Task history items:

- **View activity log**
- **Remove a task history item**
- **Manage task status**
- **Cleanup history**

2.12 Profile Manager

Use this tool to create a user profile in **Windows Stored User Names and Passwords** applet / **Credential Manager**, in order to specify the user context to run SPListX export tasks. The stored user profile will be very useful when you are trying to perform the following export tasks in scheduled manner using SPListX:

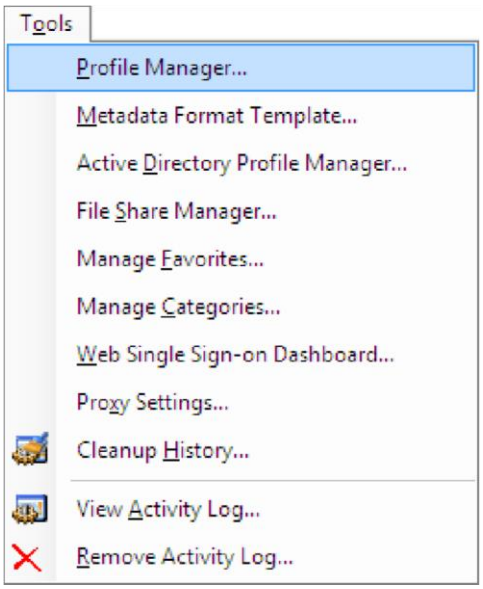
- Exporting contents between two different Windows Domain Forest
- Exporting contents from SharePoint residing in completely disconnected / untrusted Windows Domain
- Exporting contents using Laptop / PC that is not part of the SharePoint domain
- Exporting contents using Forms Based Authentication (FBA)

The stored user profile persists for all subsequent logon sessions on the same computer where SPListX is installed. The stored user profiles are visible to other logon sessions on the same computer.

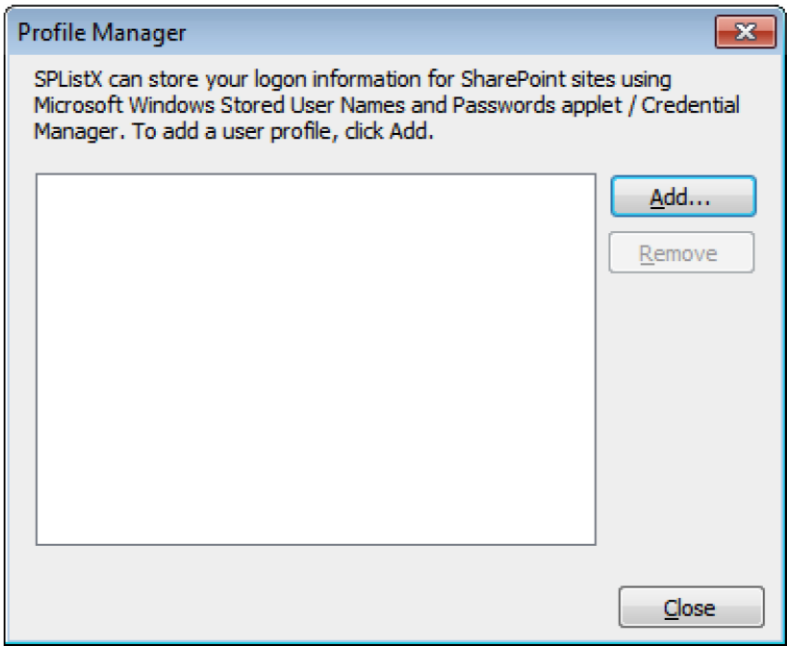
The stored user profile created by using SPListX Profile Manager is restricted to the Windows user profile context used to create the stored user profile. If the Windows User Profile is maintained locally, SPListX stored user profile is accessible only by the same user in the same computer. If the user, who creates SPListX stored user profile, has a Roaming user account in the enterprise, the SPListX stored user profile can be accessed by the same user in any computer in the Windows enterprise.

The stored user profile is a generic credential of **Windows Stored User Names and Passwords** applet / **Credential Manager** and can be used by SPListX application only. The credential information is stored securely in a *256 bit encrypted format* in **Windows Stored User Names and Passwords applet / Credential Manager.**

1) In order to create a SPListX stored user profile, select **Profile Manager** from **Tools** menu.



2) The **Profile Manager** dialog will be shown as below:

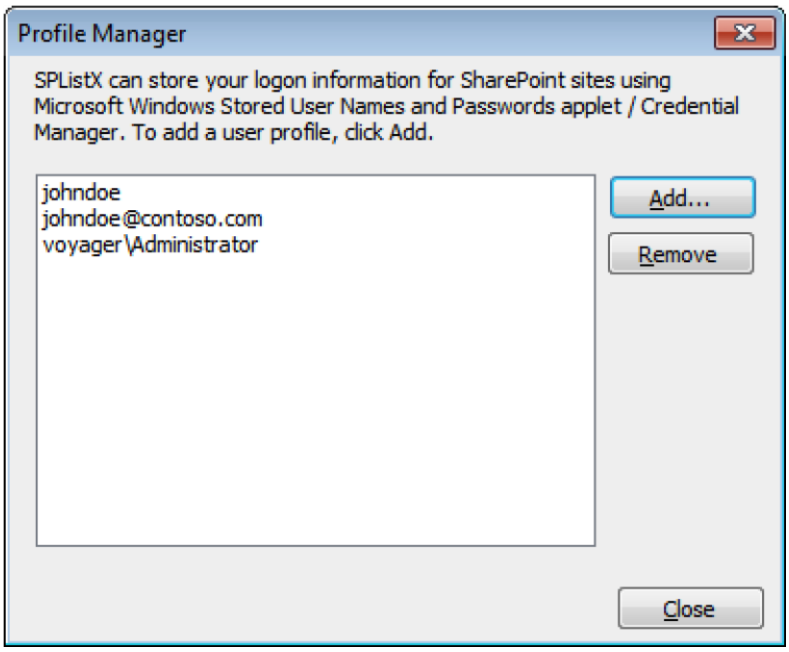

Profile Manager
SPListX can store your logon information for SharePoint sites using Microsoft Windows Stored User Names and Passwords applet / Credential Manager. To add a user profile, click Add.
Add...
Remove
Close

3) In order to add user profile, click **Add** button and provide user information in the **New User Profile** as shown below:

New User Profile
Create a new user profile and store it in Microsoft Windows Stored UserNames and Passwords applet / Credential Manager to connect to SharePoint.
User name:
Password:
Confirm Password:
OK
Cancel

Click **OK**

4) The newly added user profile will be shown in the **Profile Manager** as below:


Profile Manager
SPListX can store your logon information for SharePoint sites using Microsoft Windows Stored User Names and Passwords applet / Credential Manager. To add a user profile, click Add.
johndoe
johndoe@contoso.com
voyager\Administrator
Add...
Remove
Close

Henceforth, the stored user profile can be used as credential input in SPListX application in order to connect to the SharePoint environment.

5) Click **Close** button to close the **Profile Manager** dialog.

Additional References:

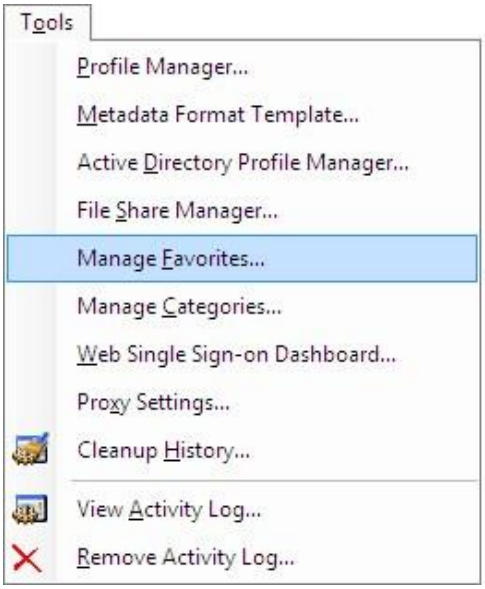
Behavior of stored user names and passwords

http://support.microsoft.com/kb/281660 **Stored User Name and Password Best practices** http://technet.microsoft.com/en-us/library/cc784749 (WS.10).aspx

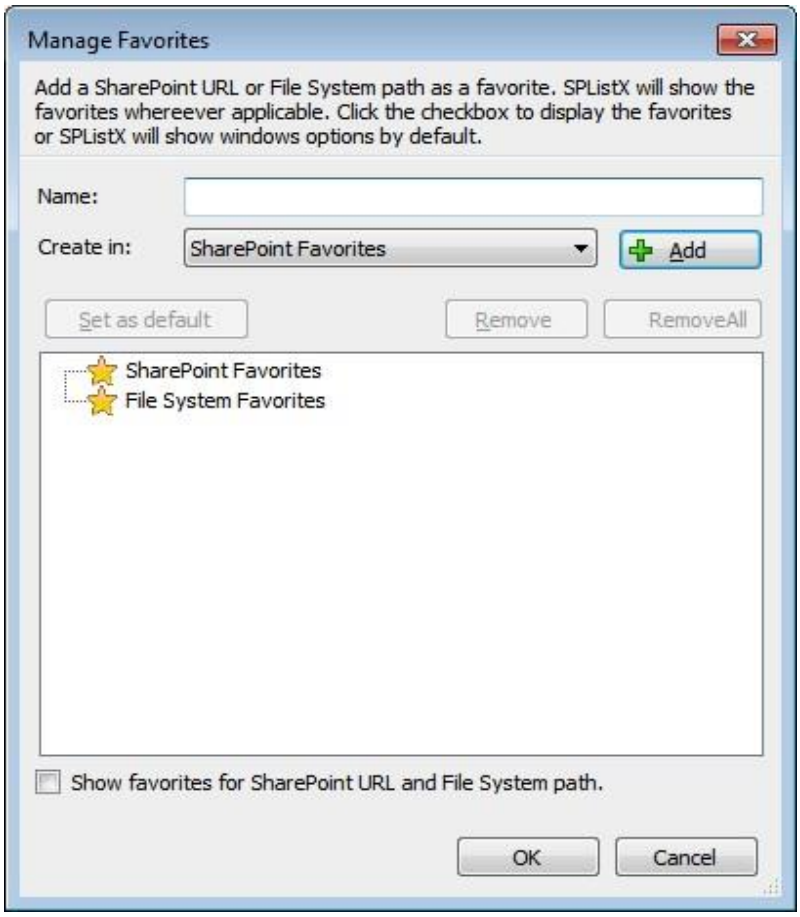
2.13 Manage Favorites

Use this tool to add frequently used SharePoint URL and File System path as favorites. Once added to favorites list, SPListX will show the relevant entries in the favorites as a dropdown wherever applicable. You can also set a particular URL and Path as a default favourite to select the entry by default in the appropriate steps.

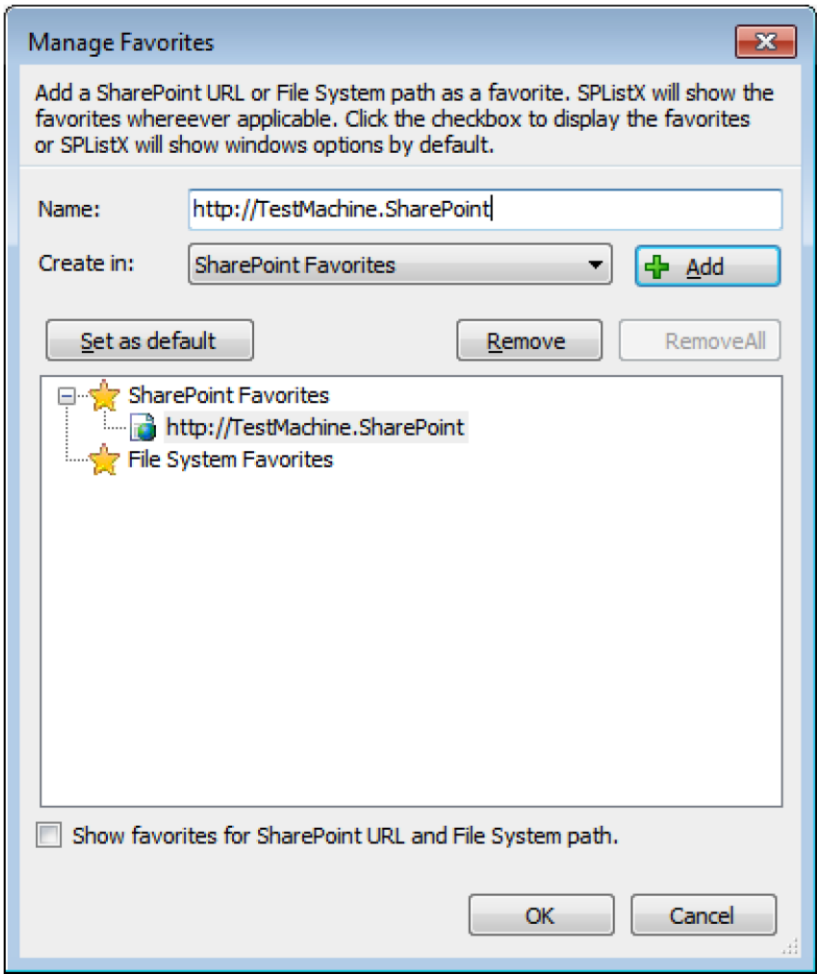
1) In order to create SPListX favorites, select **Manage Favorites** from **Tools** menu.



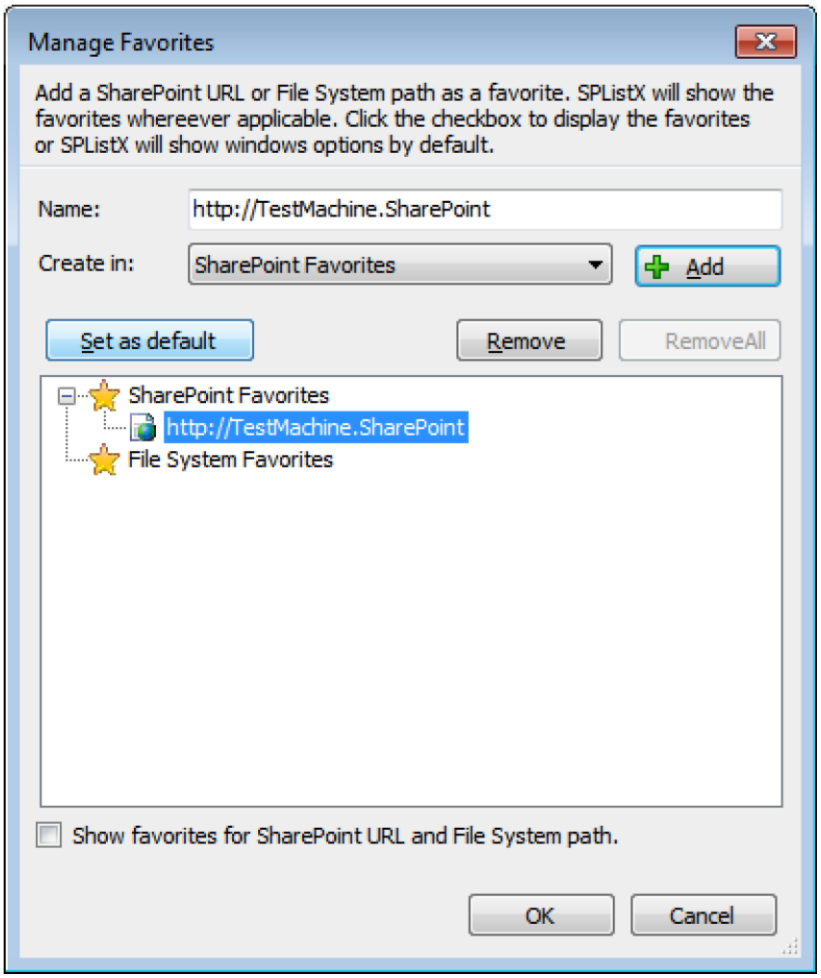
2) The **Manage Favorites** dialog will be shown as below:


Manage Favorites
Add a SharePoint URL or File System path as a favorite. SPListX will show the favorites whereever applicable. Click the checkbox to display the favorites or SPListX will show windows options by default.
Name:
Create in:
SharePoint Favorites
Add
Set as default
Remove
RemoveAll
SharePoint Favorites
File System Favorites
Show favorites for SharePoint URL and File System path.
OK
Cancel

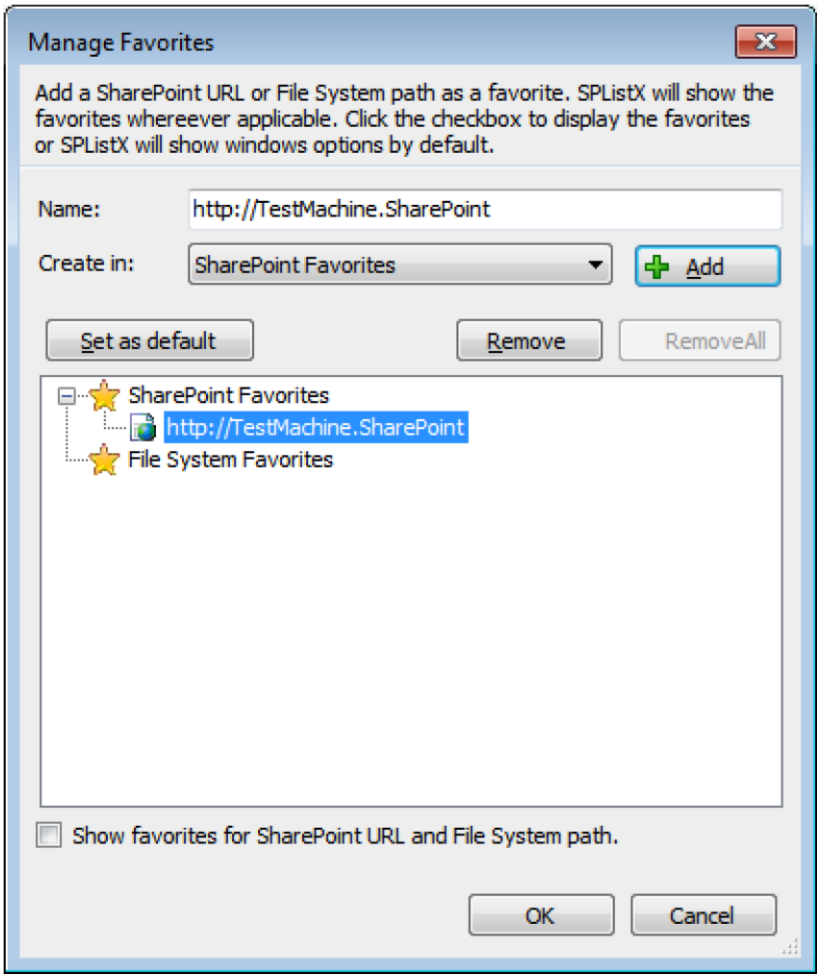
3) In order to add a favourite, select a favourite Type (i.e. SharePoint Favourite or File System Favorite) and click **Add** button to add the new favourite to the favourite list as shown below:


Manage Favorites
Add a SharePoint URL or File System path as a favorite. SPListX will show the favorites whereever applicable. Click the checkbox to display the favorites or SPListX will show windows options by default.
Name:
http://TestMachine.SharePoint
Create in:
SharePoint Favorites
Add
Set as default
Remove
RemoveAll
SharePoint Favorites
http://TestMachine.SharePoint
File System Favorites
Show favorites for SharePoint URL and File System path.
OK
Cancel

4) In order to set **Default favorite**, select a favorite and Click **Set as default** button to set the default favorite. The Default favorite will be highlighted in Bold.


Manage Favorites
Add a SharePoint URL or File System path as a favorite. SPListX will show the favorites whereever applicable. Click the checkbox to display the favorites or SPListX will show windows options by default.
Name:
http://TestMachine.SharePoint
Create in:
SharePoint Favorites
Add
Set as default
Remove
RemoveAll
SharePoint Favorites
http://TestMachine.SharePoint
File System Favorites
Show favorites for SharePoint URL and File System path.
OK
Cancel

5) To enable the favorites, you have to check the **Show favorites for SharePoint URL and File System path** option and Click **OK** button to enable the feature.

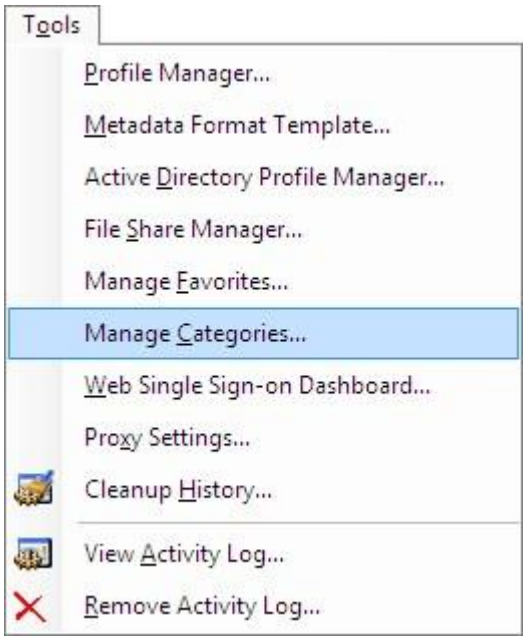

Manage Favorites
Add a SharePoint URL or File System path as a favorite. SPListX will show the favorites whereever applicable. Click the checkbox to display the favorites or SPListX will show windows options by default.
Name:
http://TestMachine.SharePoint
Create in:
SharePoint Favorites
Add
Set as default
Remove
RemoveAll
SharePoint Favorites
http://TestMachine.SharePoint
File System Favorites
Show favorites for SharePoint URL and File System path.
OK
Cancel

Henceforth, **Manage Favorites** will show the favorites as a dropdown, wherever applicable.

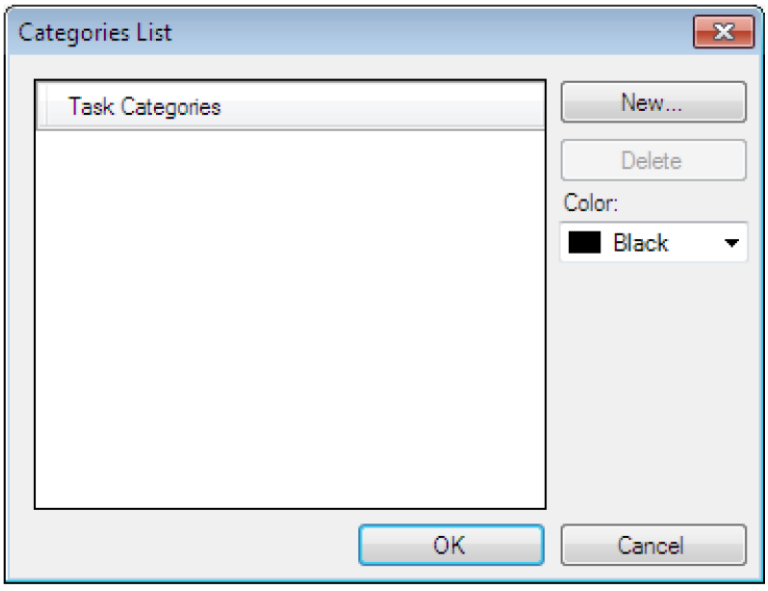
2.14 Manage Categories

Use this tool to Add, Delete categories or change the Color of the categories. The Categories will help you group the related tasks and file them together.

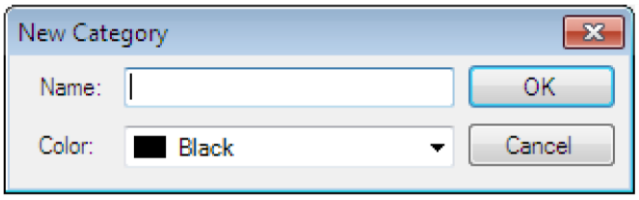
1. In order to edit a SPListX categories, select **Manage Categories** from **Tools** menu.



2. The Categories List dialog will be shown as below:

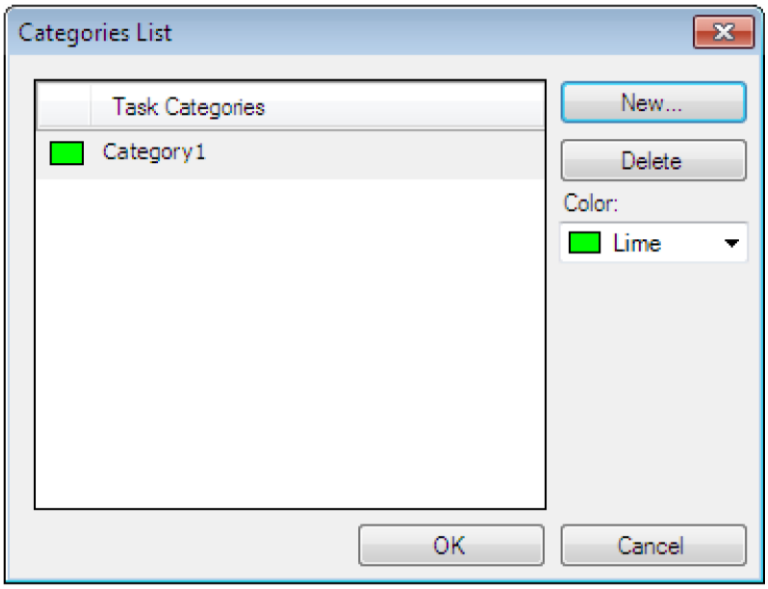


3. In order to add a category, click **New...** button and provide the information about category in the **New Category** dialog as shown below:

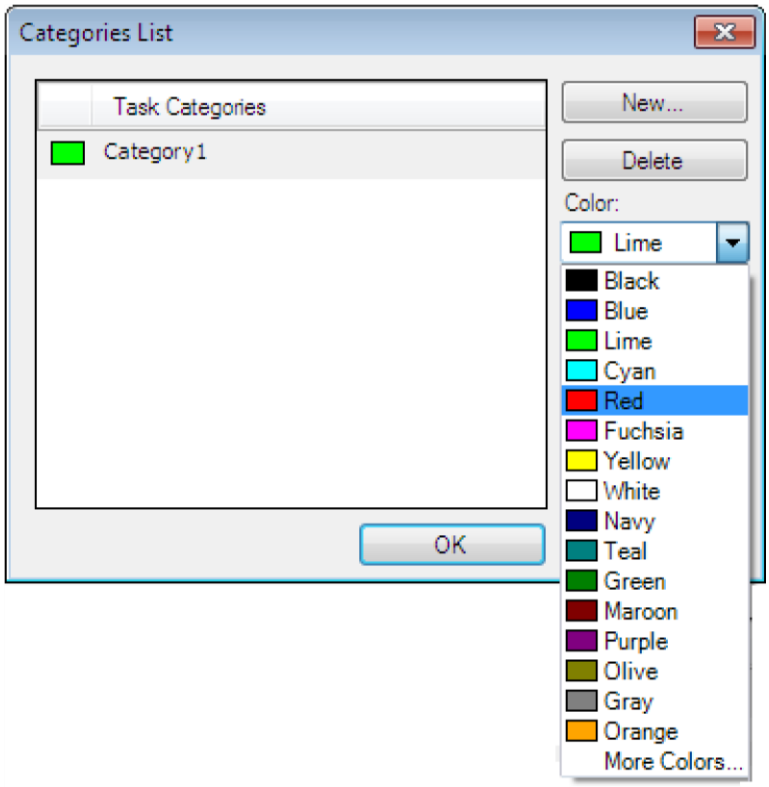


Click **OK**.

4. The newly added Category will be shown in the **Categories List** as below:



5. In order to Change the color of the existing category, Select the Category and Select the desired color in the Color Drop-Down List for the selected category as shown below:



Click **OK** to enable the feature.

Henceforth, the categories in the Categories List can be used to categorize the newly created tasks or to re-categorize old tasks.

2.15 Active Directory Profile Manager

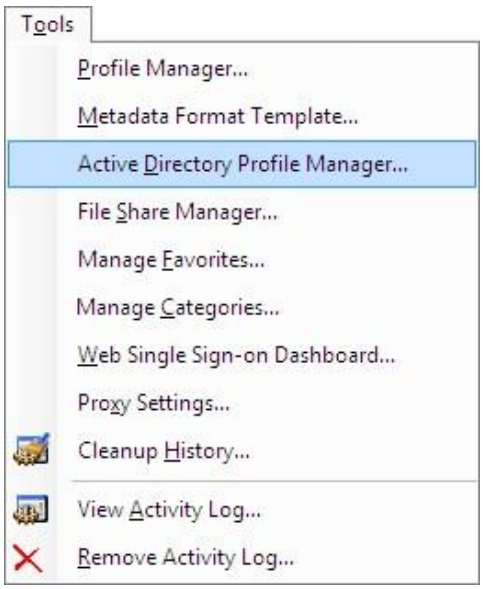
Use this tool to create an Active Directory user profile to retrieve the Domain Group members from SharePoint environment. This user profile is stored in **Windows Stored User Names and Passwords / Credential Manager.** Specify a domain user credential to connect. It is recommended to use **Administrator Credential** to retrieve the members list from the Domain Group.

SPListX stores the active directory user profile in the local computer and will be accessible only by the user who creates the user profile. If the user who creates the active directory user profile has a Roaming user account in the enterprise, the stored user profile can be accessed in any computer in the Windows enterprise.

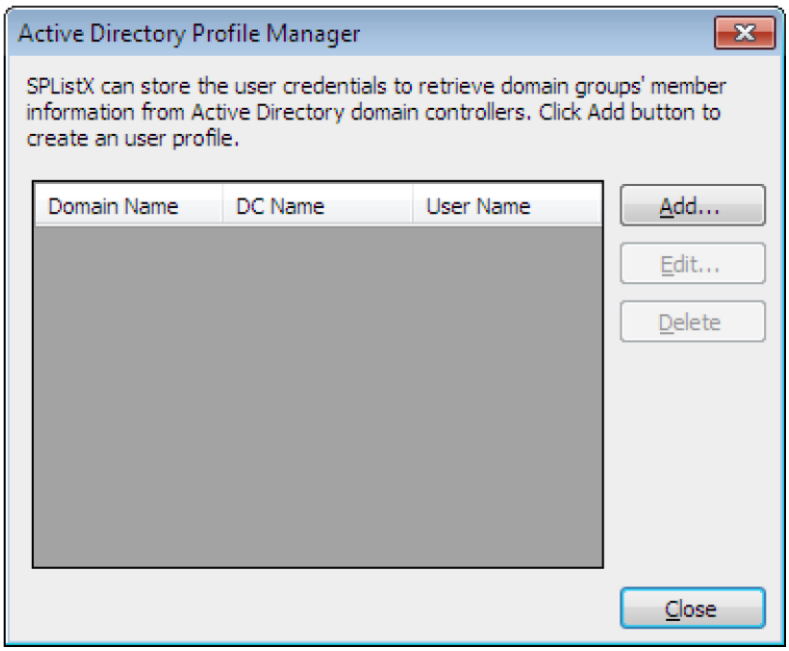
The stored active directory user profile can be used by SPListX application only. The credential information is stored securely in *256 bit encrypted format* in **Windows Stored User Names and Passwords / Credential Manager.**

For scheduled tasks, SPListX will use this stored user credential to retrieve Domain Group members from Active Directory.

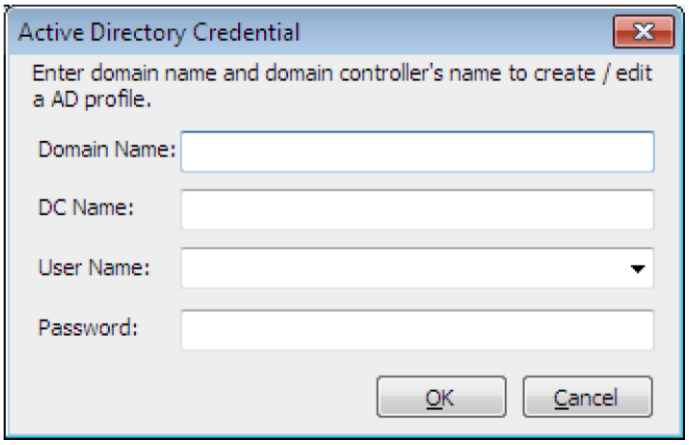
1) Select **Active Directory Profile Manager** from **Tools** menu.



2) The **Active Directory Profile Manager** dialog will be shown as below:


Active Directory Profile Manager
SPListX can store the user credentials to retrieve domain groups' member information from Active Directory domain controllers. Click Add button to create an user profile.
Domain Name
DC Name
User Name
Add...
Edit...
Delete
Close

3) In order to add user profile, click **Add** button and provide user information in the **New Active Directory Profile** as shown below:

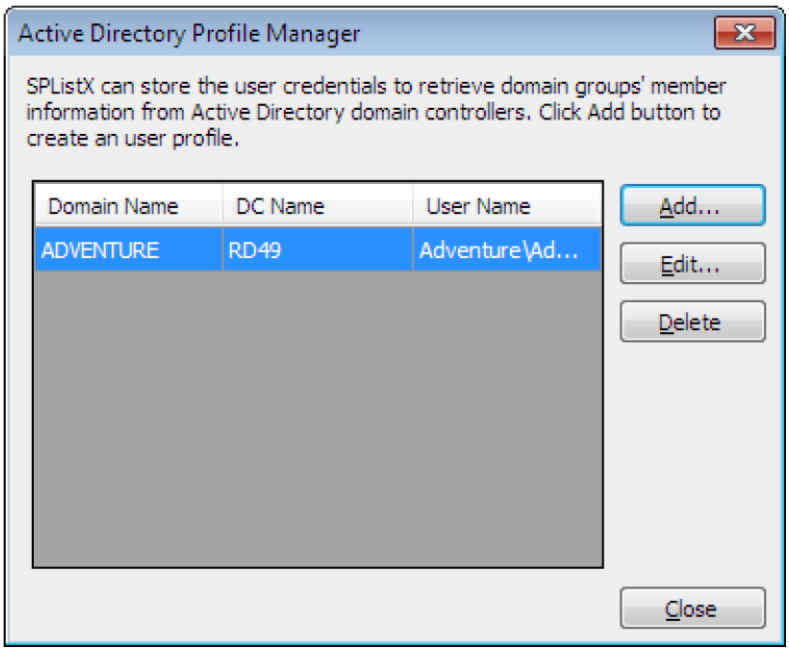


a) **Domain Name:** Specify the domain name associated with the SharePoint farm to retrieve the members.

b) **DC Name:** Specify DC (Domain Controller) Name to connect with the domain to retrieve the group members.

c) Specify a new user profile or select an existing user profile to connect with domain to export members for the domain groups referenced in SharePoint server.

4) The newly added user profile will be shown in the **Active Directory Profile Manager** as below:



Henceforth, the stored credential can be used to export Domain Group members from the SharePoint server.

5) Click **Close** button to close the **Active Directory Profile Manager** dialog.

Additional References:

Behavior of stored user names and passwords
http://support.microsoft.com/kb/281660

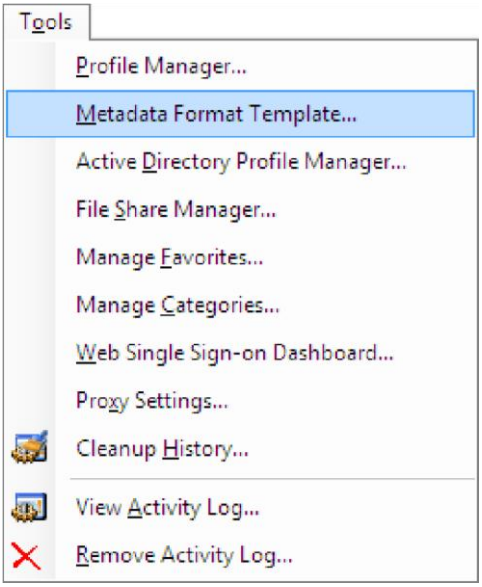
Stored User Name and Password Best practices

http://technet.microsoft.com/en-us/library/cc784749(WS.10).aspx

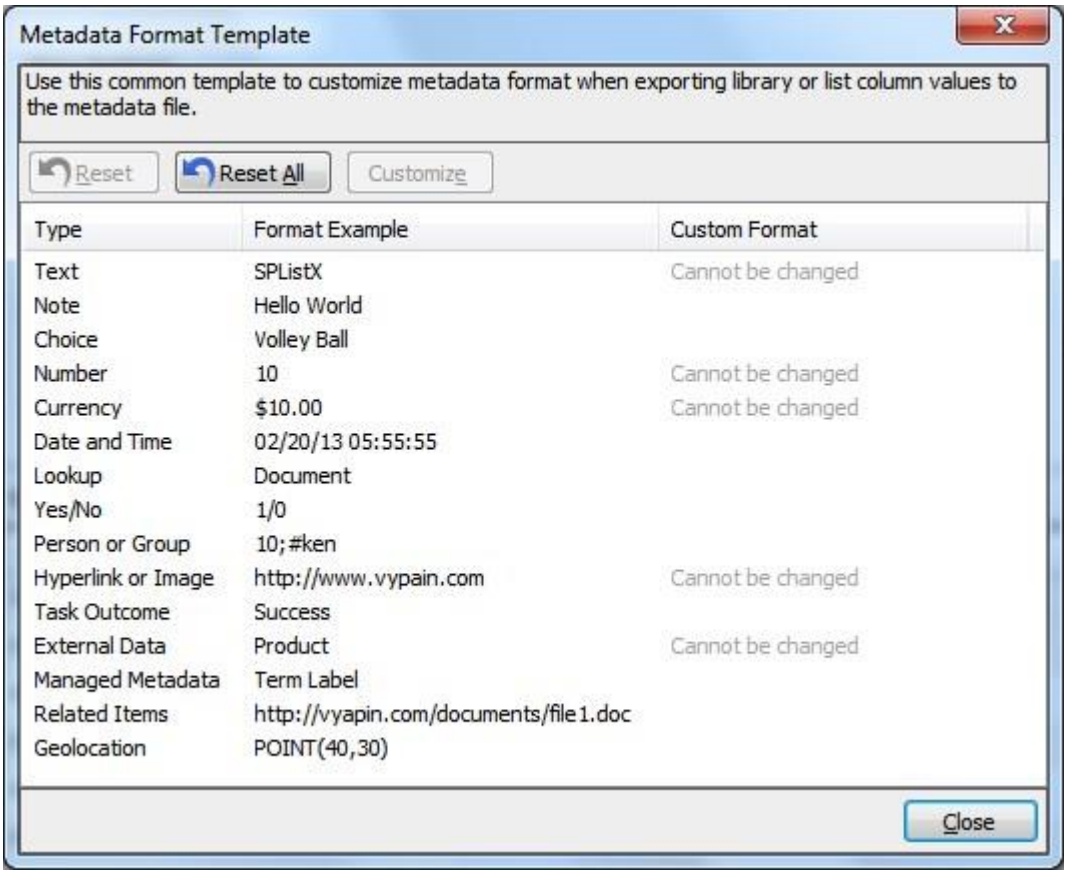
2.16 Metadata Format Template

SPListX provides a template to customize the metadata format when exporting column values to the metadata file. SPListX default formats can be customized using this template. You are allowed to customize the format of the value from the set of available or possible values for each column type. These customized formats will be used by the application when exporting SharePoint column metadata values to the metadata file. All SPListX export tasks will use this template to export metadata values to the metadata file, which can also be further in each export task.

1) Select **Metadata Format Template** from Tools menu.



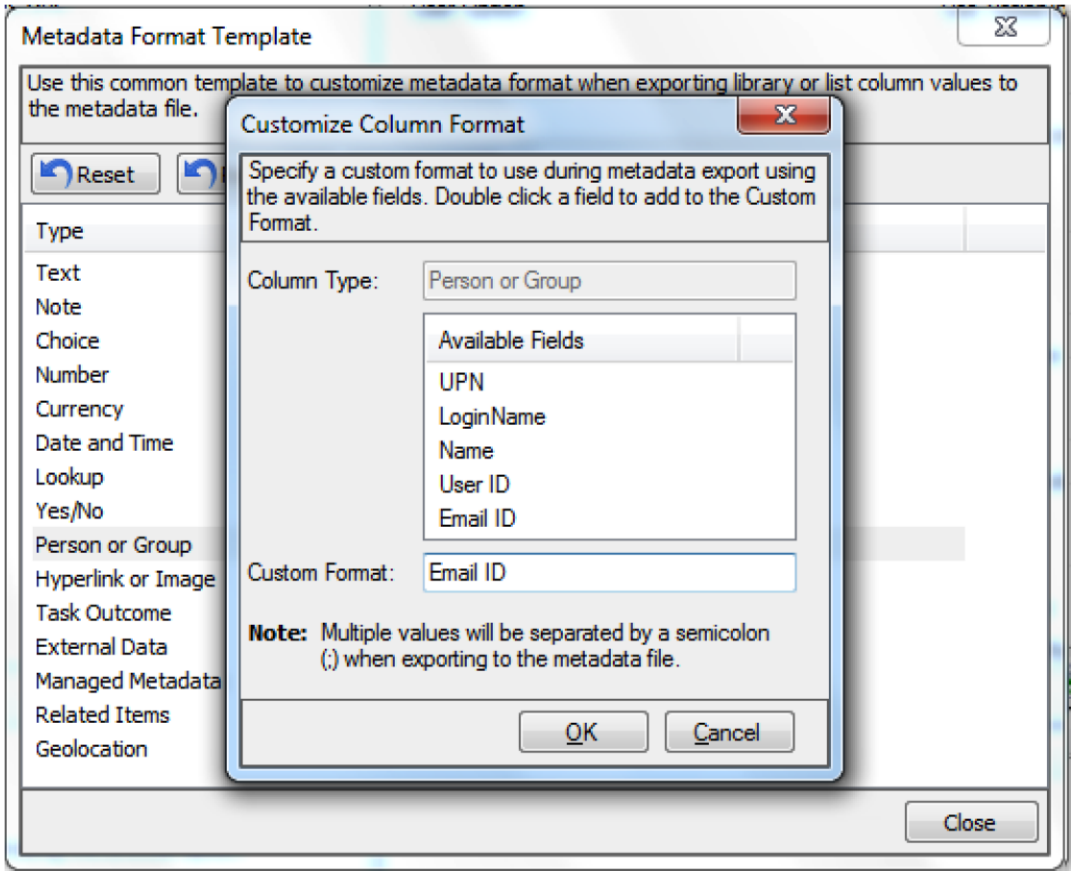
2) The **Metadata Format Template** dialog will be shown as below:



Reset: This option resets the selected column type's custom format in the template to the default format of the application.

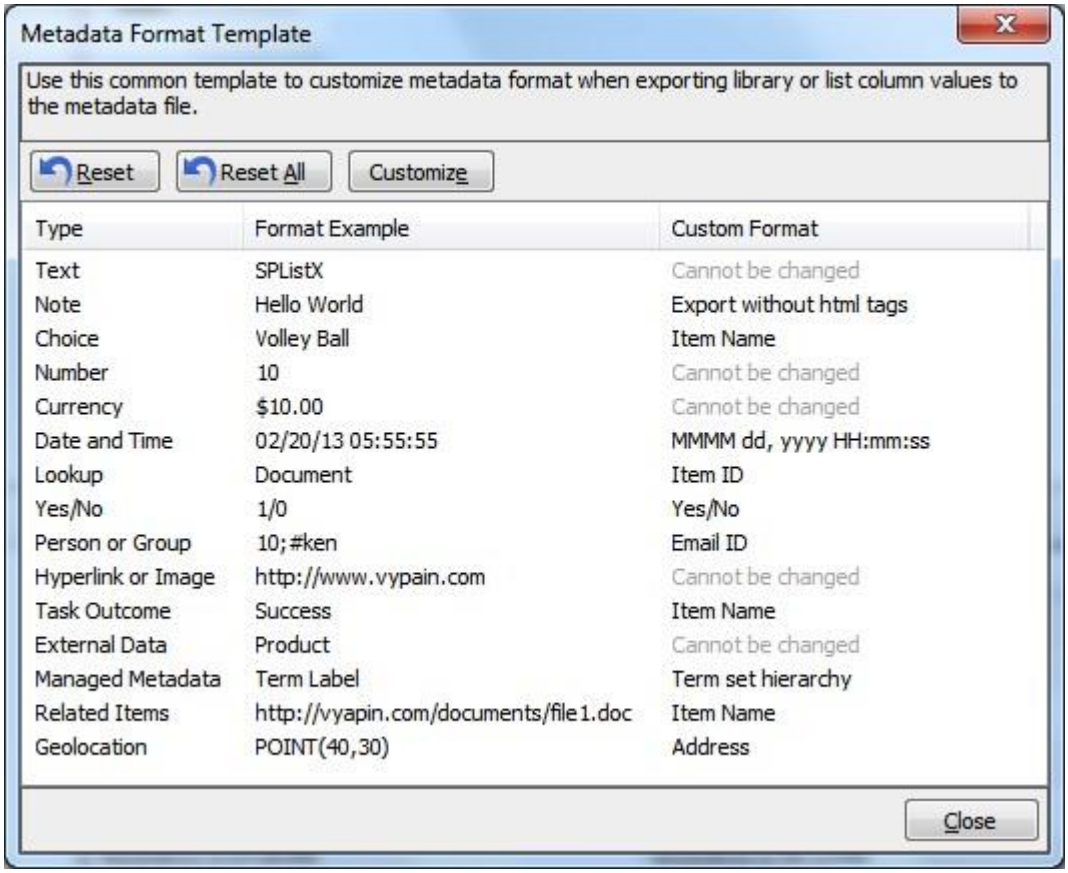
Reset All: This option resets all the column type's custom format in the template to the default format of the application.

3) In order to edit the default format, double click the column type that you wish to customize and select the macros in the **Edit dialog** as shown below:



Double click to add macros to the Custom Format textbox. You can type special characters to separate values between the built-in macros. Column values that contain multiple values in them will be separated by (;) semicolon when exporting to the metadata file.

4) The edited column type will be shown in the **Metadata Format Template** as shown below:



The specified formats in the template will be used when exporting the metadata values in all the export tasks. If the format is not specified for some reason or if the syntax is incorrect, the default format will be used for exporting the metadata values to the metadata file (as mentioned in the "Format Example" column).

5) Click **Close** button to save the applied changes.

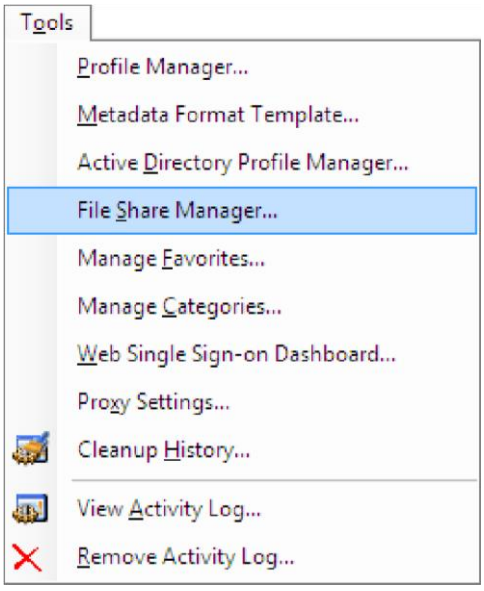
2.17 File Share Manager

Use this tool to create a file share user profile to retrieve the contents from File Shares, which are added in the search content source. These user credentials are used to access the file share source, which are added in the search crawl index and to export the file share contents to the target location. These user profiles are stored securely in **Windows Stored User Names and Passwords / Credential Manager.**

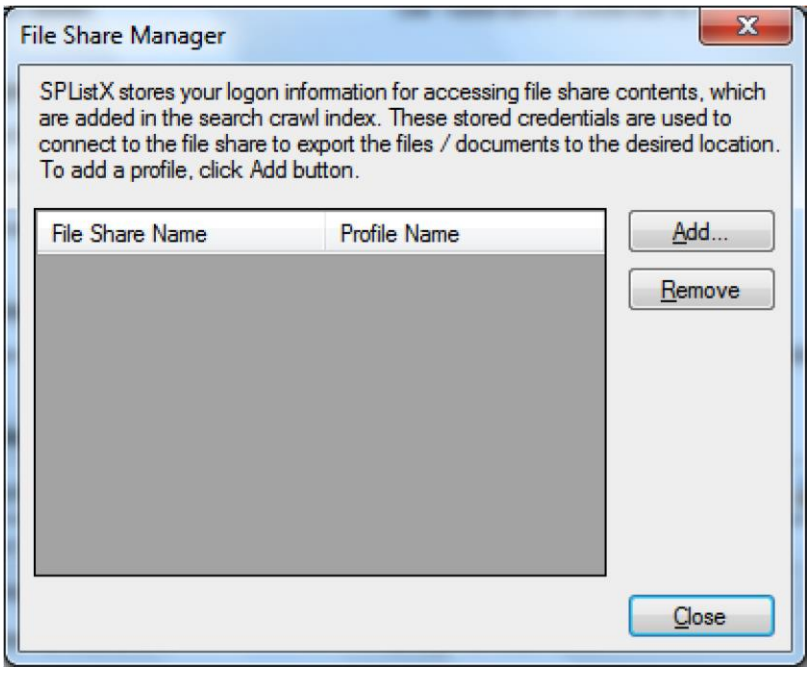
SPListX stores the file share user profile in the local computer and will be accessible only by the user who creates the user profile. If the user who creates the file share user profile has a Roaming user account in the enterprise, the stored user profile can be accessed in any computer in the Windows enterprise

The stored file share user profile can be used by SPListX application only. The credential information is stored securely in *256 bit encrypted format* in **Windows Stored User Names and Passwords / Credential Manager.**

1) Select **File Share Manager** from **Tools** menu.



2) The **File Share Manager** dialog will be shown as below:

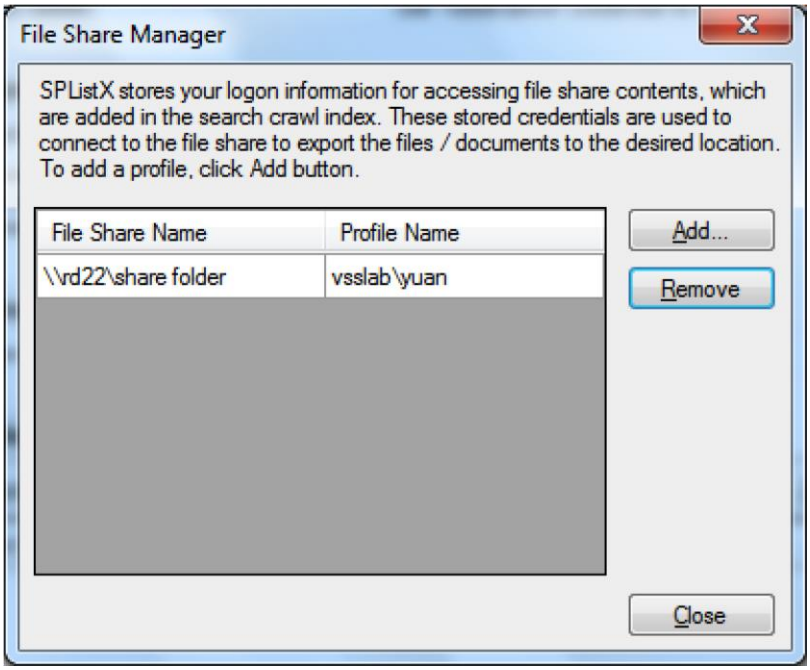

File Share Manager
SPListX stores your logon information for accessing file share contents, which are added in the search crawl index. These stored credentials are used to connect to the file share to export the files / documents to the desired location. To add a profile, click Add button.
File Share Name
Profile Name
Add...
Remove
Close

3) In order to add user profile, click **Add** button and provide user information in the **File Share Credential** as shown below:

a) **File Share Name:** Specify the file share server name, where the files are stored and the file share index is added in the search crawl index.

b) Specify a new user profile or select an existing user profile to connect to file share to export file share contents which are added in the SharePoint search crawl index.

4) The newly added user profile will be shown in the **File Share Manager** as below:


File Share Manager
SPListX stores your logon information for accessing file share contents, which are added in the search crawl index. These stored credentials are used to connect to the file share to export the files / documents to the desired location. To add a profile, click Add button.
File Share Name
Profile Name
\\rd22\share folder
vsslab\yuan
Add...
Remove
Close

Henceforth, the stored credential can be used to export the file share contents, which are added in the search crawl index in the SharePoint server.

5) Click **Close** button to close the **File Share Manager** dialog.

Additional References:

Behavior of stored user names and passwords
http://support.microsoft.com/kb/281660

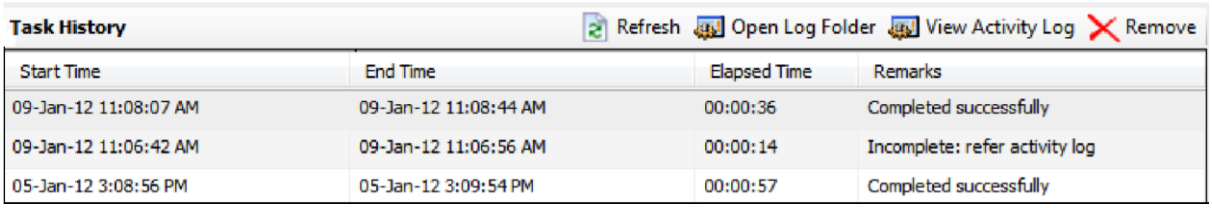
Stored User Name and Password Best practices

http://technet.microsoft.com/en-us/library/cc784749(WS.10).aspx

2.18 Remove a task history item

To remove a task history item:

1) Select item from **Task History** pane.



2) Click **Remove** from SPListX main screen.

Or Select **Remove Activity Log** from **Tools** menu

This will remove the currently selected activity log entry and log folders & files associated with the task history item. To maintain task history items, see Cleanup history and Task Status.

2.19 Cleanup Histroy

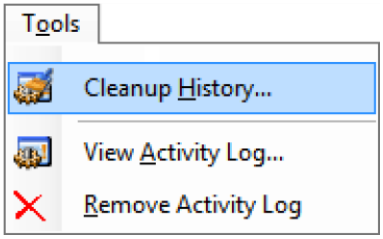
SPListX maintain the task history of each task run in the application task history folder

e.g., **<Application Data Folder>** *\SPListX\TaskHistory\<task name>\<timestamp>.*

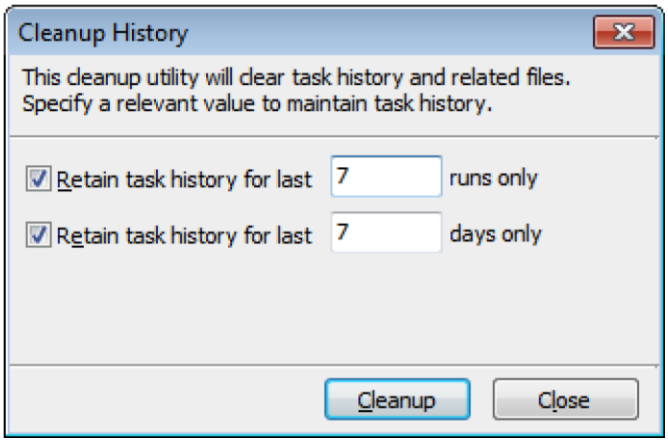
Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

1) Click **Cleanup History** from SPListX Task Manager.

Or Select **Cleanup History** from **Tools** menu



2) The **Cleanup History** dialog appears as shown below:


Cleanup History
This cleanup utility will clear task history and related files.
Specify a relevant value to maintain task history.
Retain task history for last 7 runs only
Retain task history for last 7 days only
Cleanup
Close

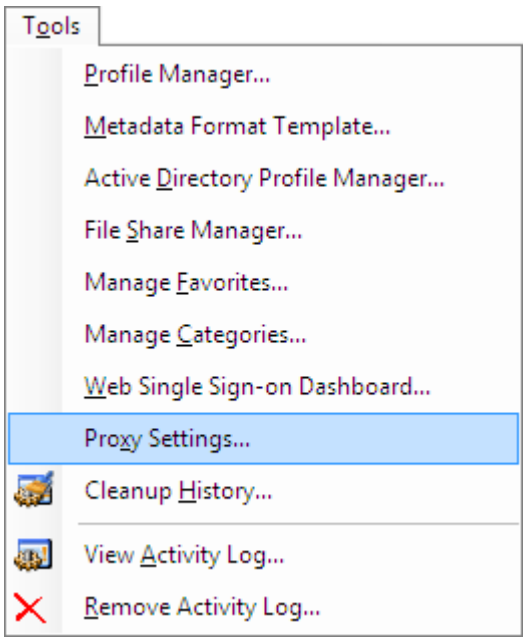
a) Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).

b) Selecting **Retain task history for last <n> days only** option will remove all history entries for each task that are older than <n> days.

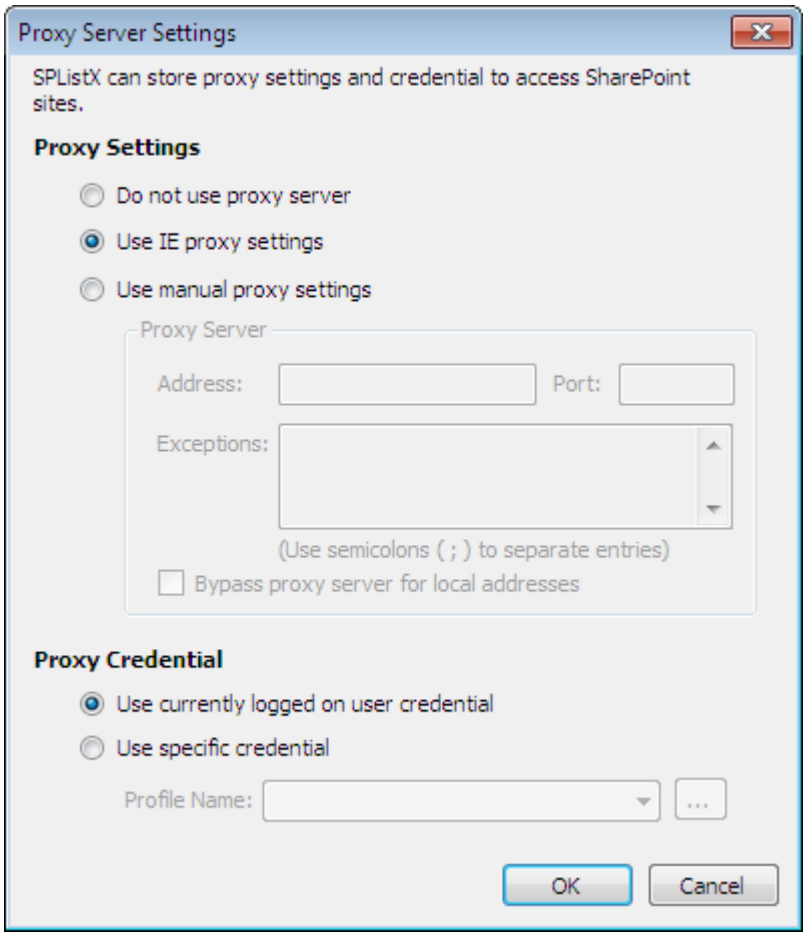
2.20 Proxy Server Settings

Use this tool to specify the Proxy Server settings to use if you wish to override Internet Explorer's proxy settings (set as default). You can specify a custom proxy and credential to create a connection with the SharePoint server. The proxy server settings will be used globally within SPListX application.

1) Select Proxy Server Settings from Tools menu.



2) The Proxy Server Settings dialog will be shown as below:


Proxy Server Settings
SPListX can store proxy settings and credential to access SharePoint sites.
Proxy Settings
Do not use proxy server
Use IE proxy settings
Use manual proxy settings
Proxy Server
Address:
Port:
Exceptions:
(Use semicolons (;) to separate entries)
Bypass proxy server for local addresses
Proxy Credential
Use currently logged on user credential
Use specific credential
Profile Name:
...
OK
Cancel

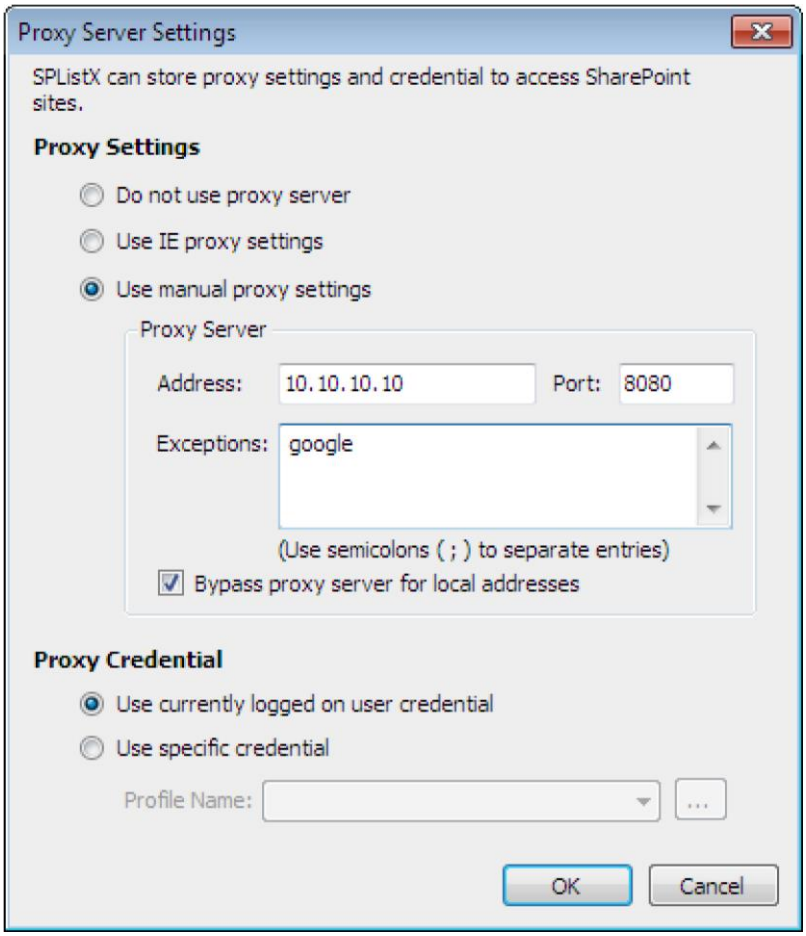
3) Specify Proxy Server Settings to use:

a) Do not use proxy server - This option will not use the proxy settings to connect to the SharePoint server.

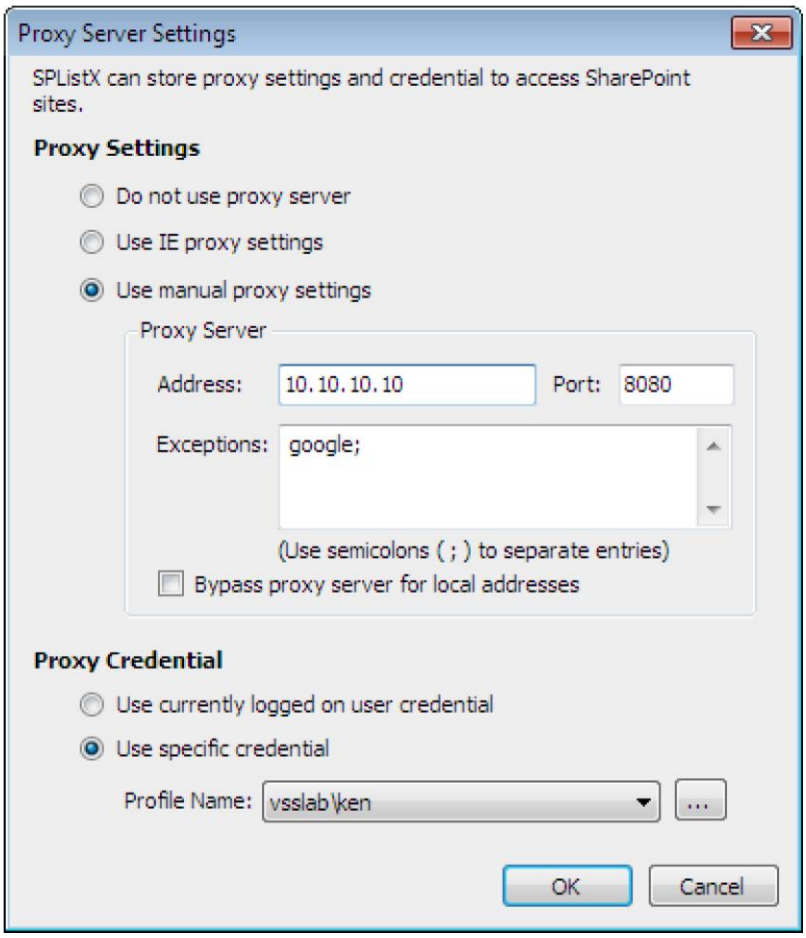
b) Use IE proxy settings - This option will use the Default Proxy Settings used by Internet Explorer (IE).

c) Use manual proxy settings - The proxy server specified in this option will be used by SPListX to connect to the SharePoint server. Enter the Address, Port and Exceptions list as you do in Internet Explorer to specify the proxy settings.

d) Bypass proxy server for local address -This option controls whether requests for resources on the LAN are sent to the proxy server or sent directly to the host where the resource resides.



4) Select **Proxy Credential** to use when connecting to the proxy server and request authorization to connect to the SharePoint server:



a) Use currently logged on user credential - This option will use the currently logged on user account to connect to the proxy server and request authorization to connect to the resource.

b) Use specific credential - You can specify a different user credential, which is stored in Windows Credential Manager to connect to the proxy server and request authorization to connect to the resource. To add a new user profile, click ... button**.**

5) Click **Close** button to *close* the **Proxy Server Settings** dialog.

2.21 Web Single Sign-on Dashboard

Web Single Sign-on Dashboard helps you verify the connectivity status for a claimsenabled SharePoint site. The persistent connection ensures that SPListX can execute the export task in unattended mode or scheduled mode using the already established connection for the SharePoint site. SPListX uses Web Single Sign-on framework to eliminate providing username and password to connect to SharePoint as long as the connection is already available for the site.

Shared Credential

A **Shared Credential** is nothing but a credential that can be accessed by any claimaware applications such as Internet Explorer, SPListX, etc. The shared credential is a combination of user name and password stored / used in a secured manner within the current Windows user profile. You can create the shared credential by selecting ***Keep me signed in*** option in the login dialog. If the shared credential is already available in the current Windows user profile, Web Single Sign-on uses this credential to access the SharePoint site unless the cookie is deleted.

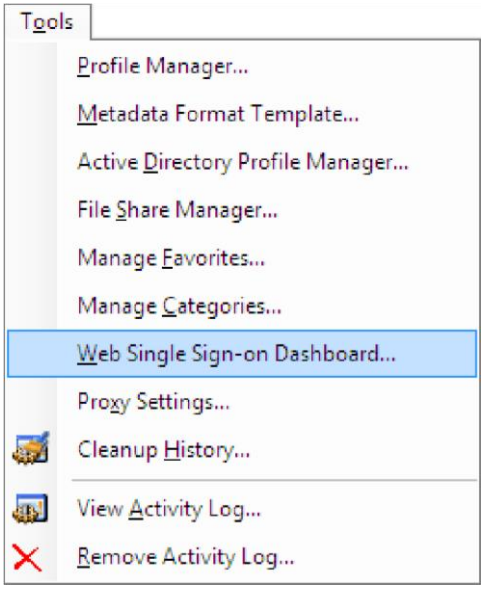
The **Shared Credential** will be very useful when you are trying to perform the following export tasks in scheduled manner using *SPListX:*

- Exporting contents using Federated Authentication / Claims Authentication
- Exporting contents from Office365 SharePoint Online that uses federated identify configured through ADFS

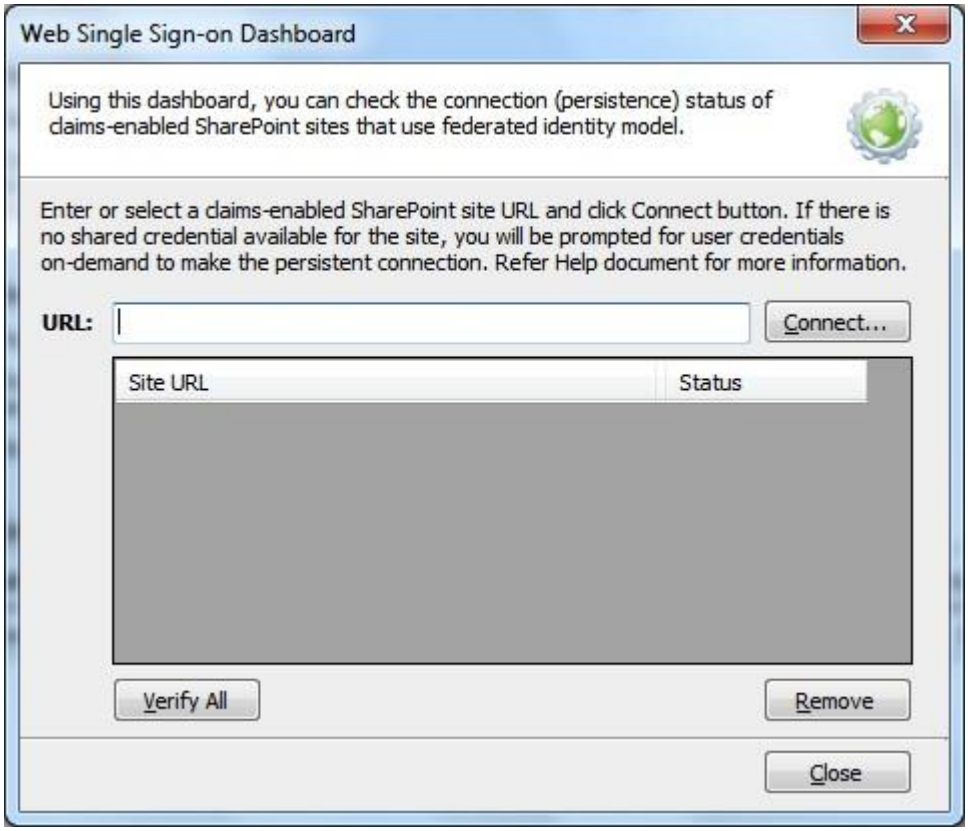
The shared credential persists for all subsequent logon sessions on the same computer where SPListX is installed unless the federation service treats it as expired or if the cookie is deleted from the computer.

The shared credential by nature is restricted to the Windows user profile context only. The shared credential is accessible only by the same user in the same computer. The shared credential can be removed by deleting the cookies using Internet Explorer.

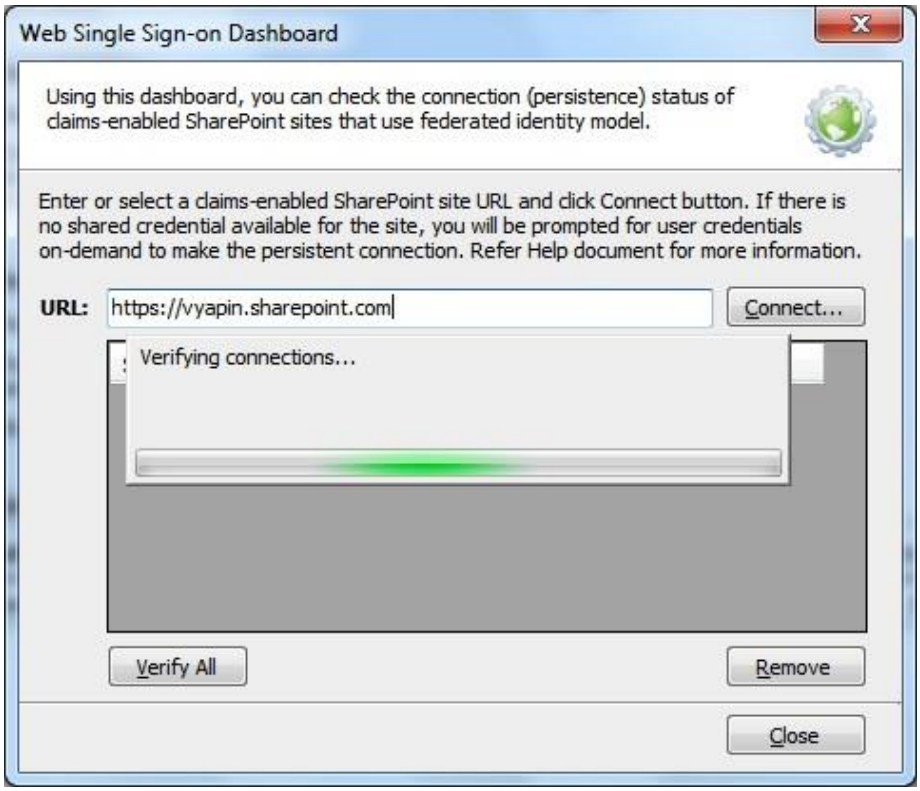
1) Launch **Web Single Sign-on Dashboard** tool using **Tools** menu.



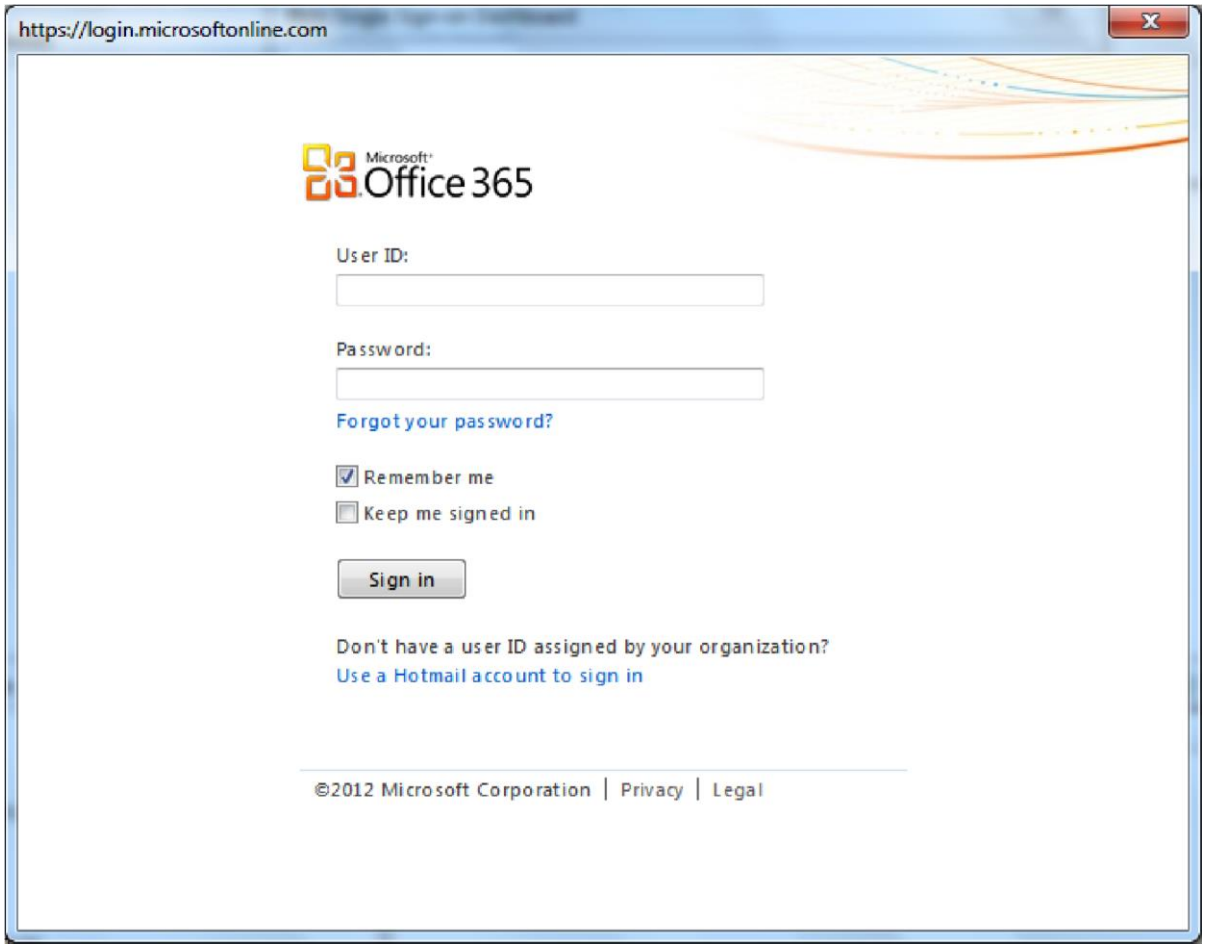
2) The **Web Single Sign-on Dashboard** dialog will be shown as below:


Web Single Sign-on Dashboard
Using this dashboard, you can check the connection (persistence) status of claims-enabled SharePoint sites that use federated identity model.
Enter or select a claims-enabled SharePoint site URL and click Connect button. If there is no shared credential available for the site, you will be prompted for user credentials on-demand to make the persistent connection. Refer Help document for more information.
URL:
Connect...
Site URL
Status
Verify All
Remove
Close

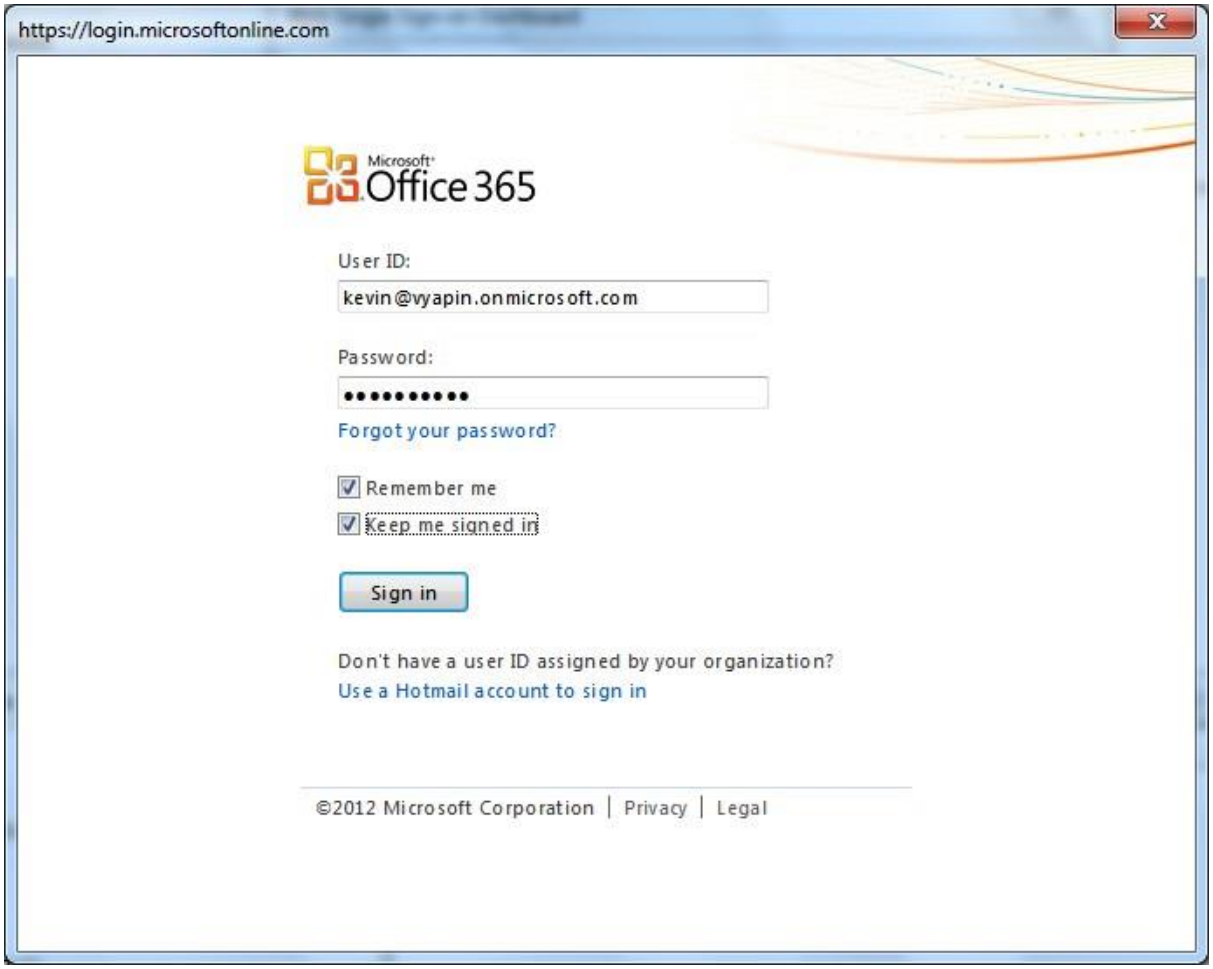
3) In order to verify the connectivity status of a site, provide the site **URL** in the text box and click **Connect** button to commence the authentication process.


Web Single Sign-on Dashboard
Using this dashboard, you can check the connection (persistence) status of claims-enabled SharePoint sites that use federated identity model.
Enter or select a claims-enabled SharePoint site URL and click Connect button. If there is no shared credential available for the site, you will be prompted for user credentials on-demand to make the persistent connection. Refer Help document for more information.
URL:
https://vyapin.sharepoint.com
Connect...
Verifying connections...
Verify All
Remove
Close

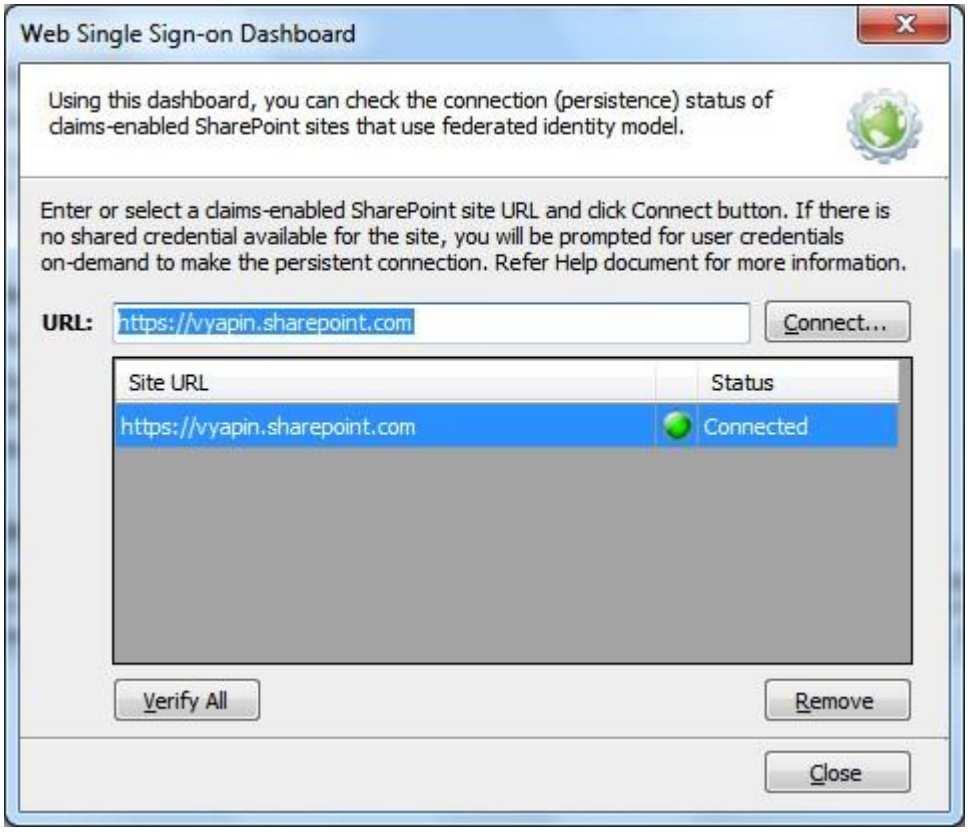
4) If there is no shared credential available for the SharePoint site, you will be prompted for user credentials automatically as shown below:



5) Provide the user name and password in the respective text box. Select **keep me signed-in** option to create the shared credential and establish a persistent connection. Click **Sign-in**.



6) Once the authentication process is finished, the connectivity status will be shown as below:


Web Single Sign-on Dashboard
Using this dashboard, you can check the connection (persistence) status of claims-enabled SharePoint sites that use federated identity model.
Enter or select a claims-enabled SharePoint site URL and click Connect button. If there is no shared credential available for the site, you will be prompted for user credentials on-demand to make the persistent connection. Refer Help document for more information.
URL:
https://vyapin.sharepoint.com
Connect...
Site URL
Status
https://vyapin.sharepoint.com
Connected
Verify All
Remove
Close

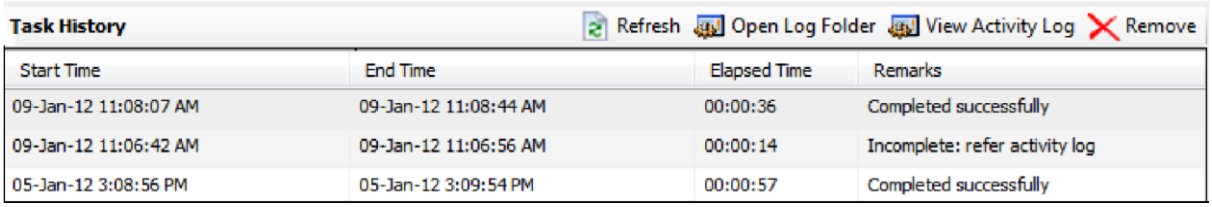
Henceforth, the shared credential can be used to connect to the federated SharePoint site by SPListX until the connectivity is closed or cookies are deleted.

7) Click **Close** button to *close* **Web Single Sign-on Dashboard** dialog.

2.22 View Activity Log

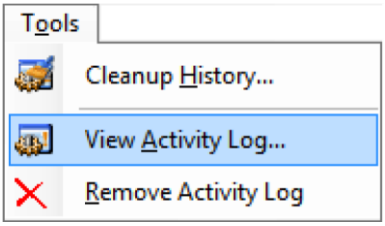
To **View Activity Log** associated with a task history item:

1) Select an item from **Task History** pane.

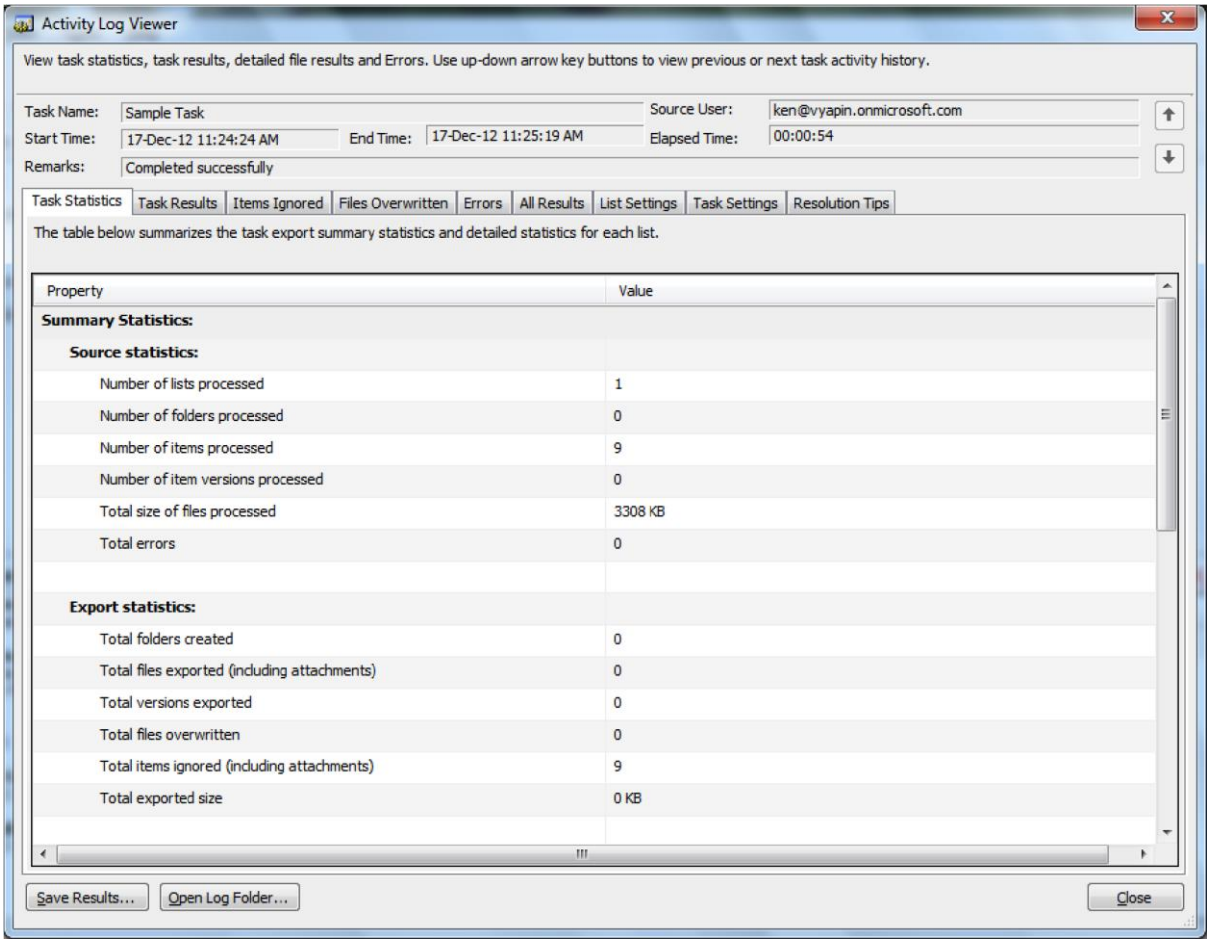


2) Click **View Activity Log** from SPListX main screen.

Or Select **View Activity Log** from **Tools** menu



3) The **Activity Log Viewer** dialog appears as shown below:


Activity Log Viewer
View task statistics, task results, detailed file results and Errors. Use up-down arrow key buttons to view previous or next task activity history.
Task Name: Sample Task
Source User: ken@vyapin.onmicrosoft.com
Start Time: 17-Dec-12 11:24:24 AM
End Time: 17-Dec-12 11:25:19 AM
Elapsed Time: 00:00:54
Remarks: Completed successfully
Task Statistics
Task Results
Items Ignored
Files Overwritten
Errors
All Results
List Settings
Task Settings
Resolution Tips
The table below summarizes the task export summary statistics and detailed statistics for each list.
Property
Value
Summary Statistics:
Source statistics:
Number of lists processed 1
Number of folders processed 0
Number of items processed 9
Number of item versions processed 0
Total size of files processed 3308 KB
Total errors 0
Export statistics:
Total folders created 0
Total files exported (including attachments) 0
Total versions exported 0
Total files overwritten 0
Total items ignored (including attachments) 9
Total exported size 0 KB
Save Results...
Open Log Folder...
Close

4) The activity log of a task is classified into nine different categories (seen under separate tabs):

a) Task Statistics: Summarizes the manage task summary statistics and detailed statistics for each SharePoint list.

b) Task Results: Summarizes detailed result of each task level check.

c) Items Ignored: Summarizes the items ignored during export process based on certain conditions.

d) Files Overwritten: Summarizes the files overwritten during export process.

e) Errors: Summarizes the errors that occurred during export.

f) All Results: Summarizes the detailed results of the export task.

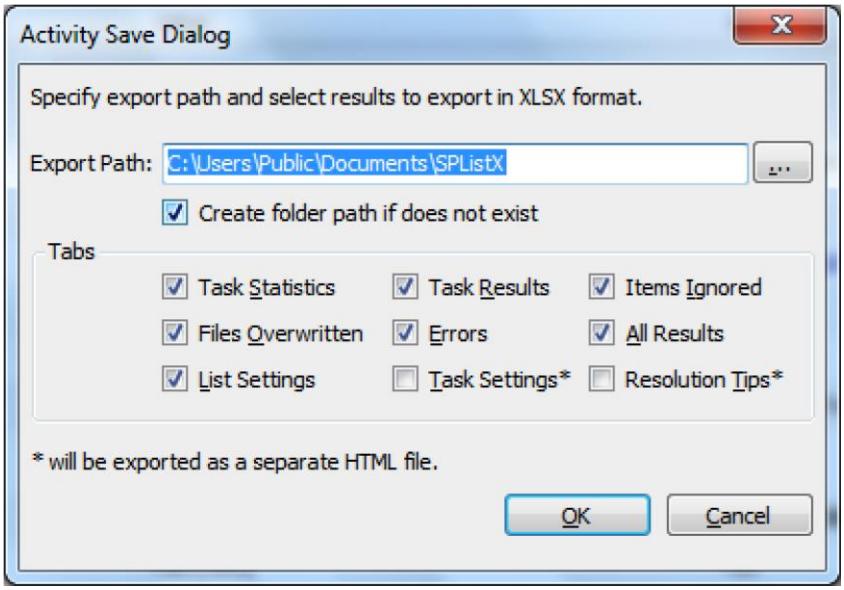
g) List Settings: Summarizes the destination List Settings at the time of export.

h) Task settings: Summarizes the task settings at the time of export.

i) Resolution Tips: Summarizes the commonly encountered error messages and the ways to address them.

5) Click **Save Results** button.

The **Activity Save dialog** appears as shown below:



6) Select reports to save task results in Microsoft Excel format (XLSX). Each report in ActivityLogViewer dialog is stored as a separate worksheet in MS-Excel.

NOTE: Task Settings and Resolution Tips will be exported as a separate HTML file.

7) Click **Open Log Folder** buttons, to open the folder that contains the activity log of the currently displayed task history item.

NOTE: For all errors, refer **File Errors** section of Activity Log to view a description of the actual error that occurred during export.

3 Export SharePoint List contents using the browse option

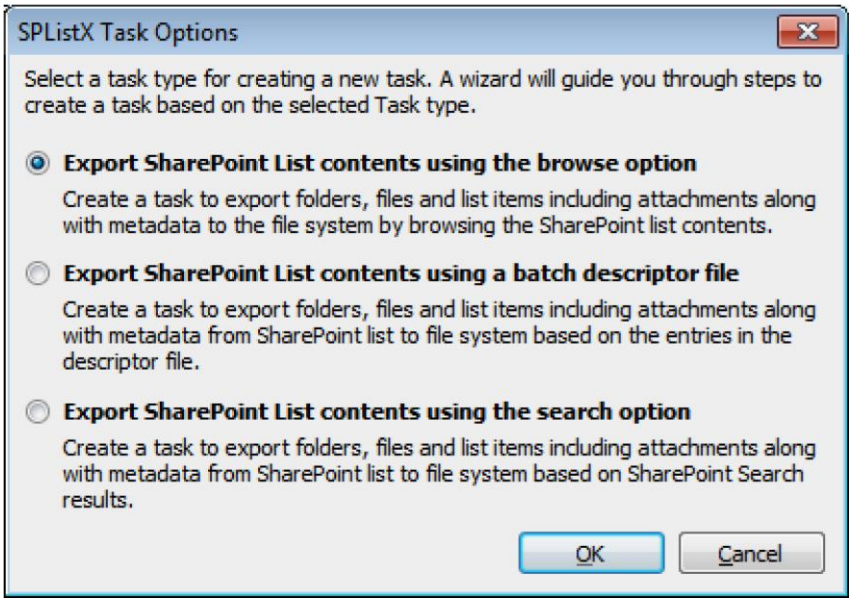
Create task

- Export Options
- SharePoint Source Location
- Items to Export
- List View Options
- Version Options
- Permission Options
- Export Conditions
- Document Packaging Options
- Destination Folder Options
- File Settings
- Metadata File Settings
- Task Settings

3.1 Create Task

To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

1) Select **Export SharePoint List contents using the browse option** in **SPListX Task Options** dialog as shown below and click **OK.**


SPListX Task Options
Select a task type for creating a new task. A wizard will guide you through steps to create a task based on the selected Task type.
Export SharePoint List contents using the browse option
Create a task to export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
Export SharePoint List contents using a batch descriptor file
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
Export SharePoint List contents using the search option
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint Search results.
OK
Cancel

2) The **SPListX Task Wizard** appears as shown below:

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

3) Click **Next** button

4) Specify the **SharePoint source location**

5) Add **Folders and items to export**

6) Specify **List View Options**

7) Specify **Version Options**

8) Specify **Permission Options**

9) Specify **Export Conditions**

10) Specify **Document Packaging Options**

11) Add **Destination Folder Option**

12) Specify **File Settings**

13) Specify **Metadata File Settings**

14) Specify **Task Settings**

15) Click **Finish** button to create the task, or click **Back** button to change the task settings.

3.1.1 Export Options

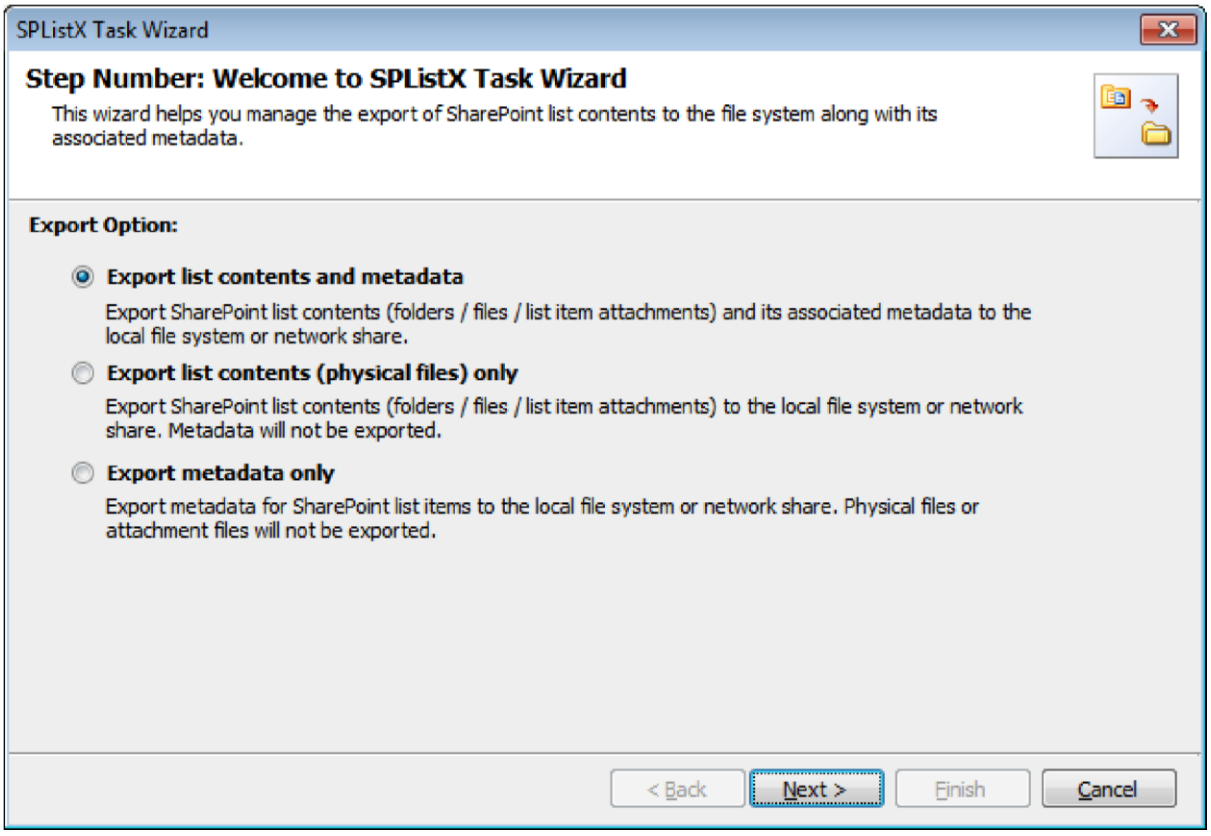
You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

A. **Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.

B. **Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.

C. **Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:

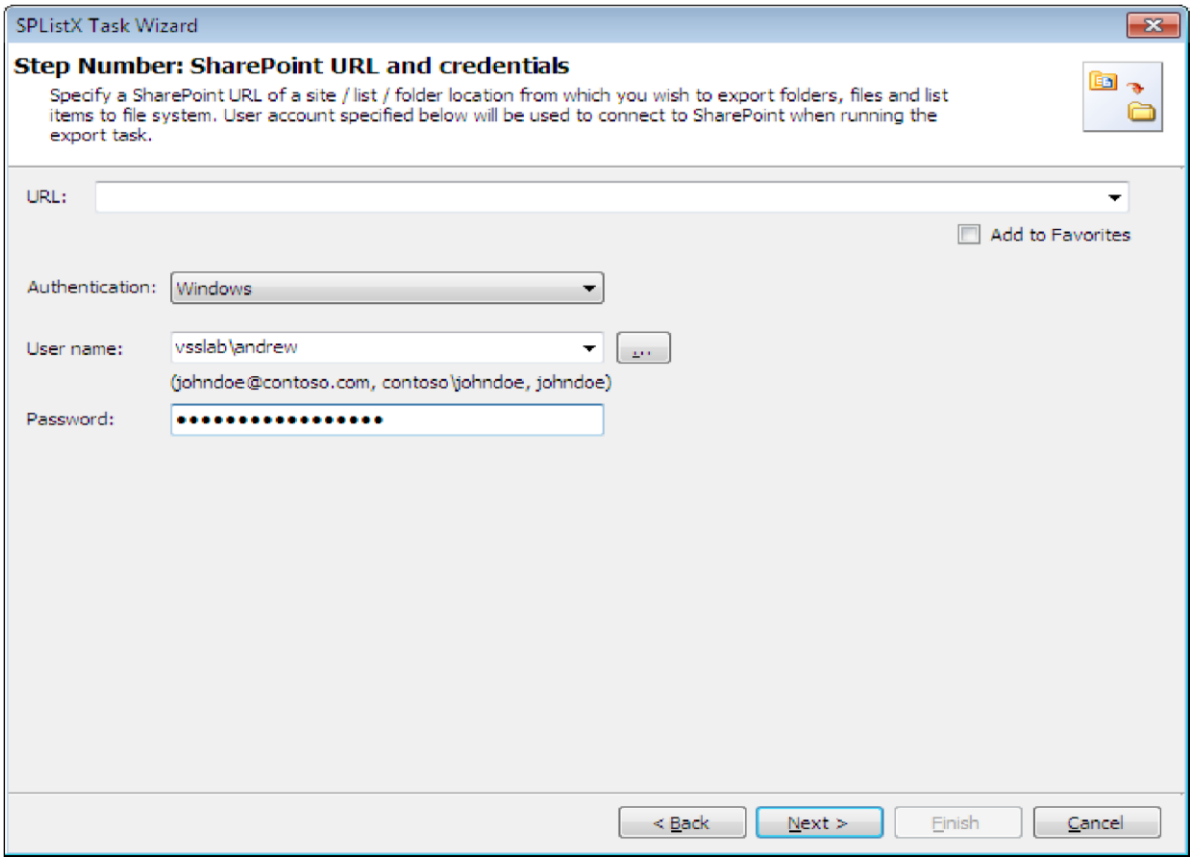

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

Select the required export options. The wizard guides you with the steps accordingly.

3.1.2 SharePoint source location

To specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items including attachments to the file system, perform the steps given below:

1) The **SharePoint source location** step appears as shown below:


SPListX Task Wizard
Step Number: SharePoint URL and credentials
Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.
URL:
Add to Favorites
Authentication:
Windows
User name:
vsslab\andrew
(johndoe@contoso.com, contoso\johndoe, johndoe)
Password:
< Back
Next >
Finish
Cancel

2) Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site, list or folder location in the URL textbox. SPListX will load the tree view of the source location from the level specified in this textbox.

3) Specify the **Authentication** mechanism and credentials to connect to SharePoint using one of the options described below:

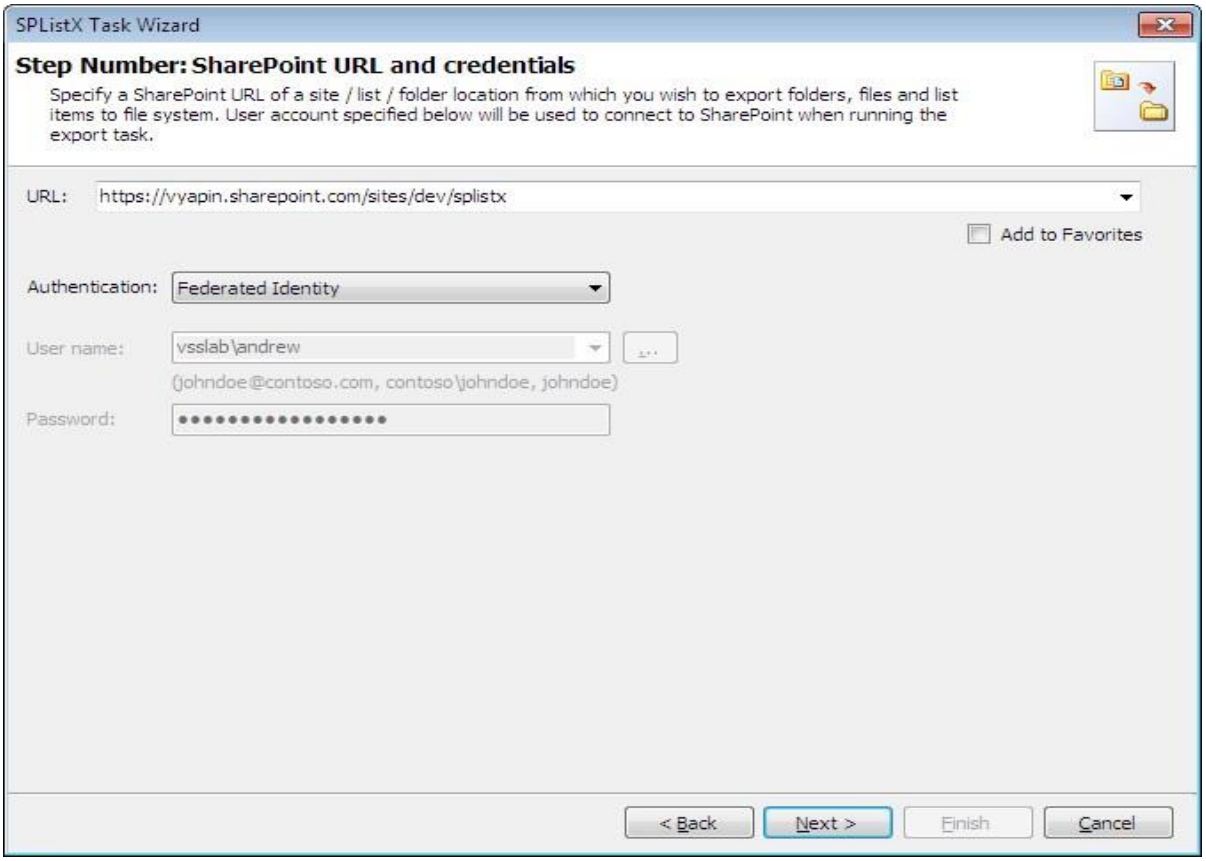
a) Windows or Forms - SPListX will initiate Windows or Forms authentication using the user account information stored in the user profile or the one entered in the textbox.

b) **Office 365 Cloud Identity -** Connects to a SharePoint Online site in Office 365 using the given cloud identity i.e., Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com.

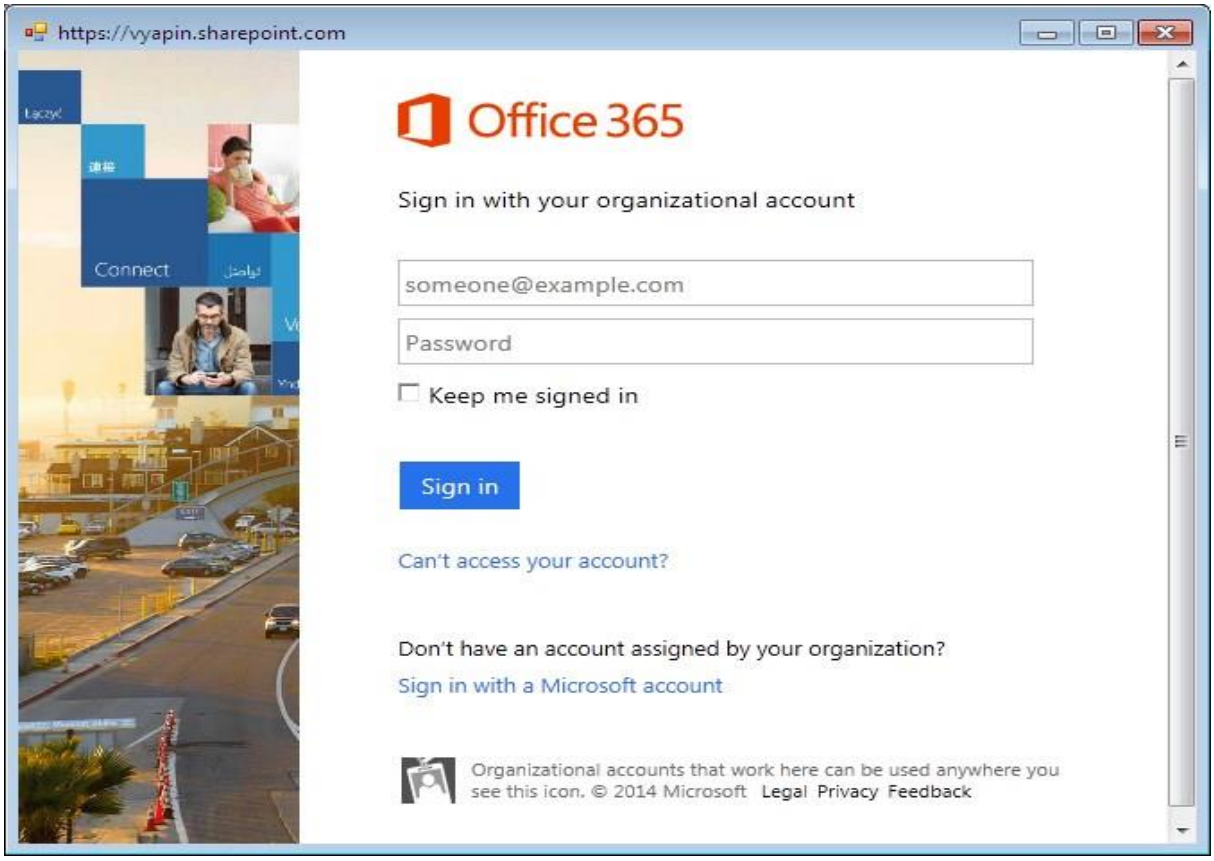
c) **Federated Identity** – Connects to a SharePoint site (On-premise or SharePoint Online) using the federated identity account configured using ADFS. Select this option to connect to Office 365 SharePoint Online sites that are configured using federated identity provider.

4) Select **Add to Favorites** checkbox to add the URL to SharePoint Favorites.

5) To connect to Office 365's SharePoint Online site that authenticates users using a trusted identity provider, you can select the Federated Identity option and proceed with the login process as shown below:


SPListX Task Wizard
Step Number: SharePoint URL and credentials
Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.
URL:
https://vyapin.sharepoint.com/sites/dev/splistx
Add to Favorites
Authentication:
Federated Identity
User name:
vsslab\andrew
(johndoe@contoso.com, contoso\johndoe, johndoe)
Password:
< Back
Next >
Finish
Cancel

5) Upon clicking **Next** button to proceed, you will be prompted for login credentials (username and password) as shown below:

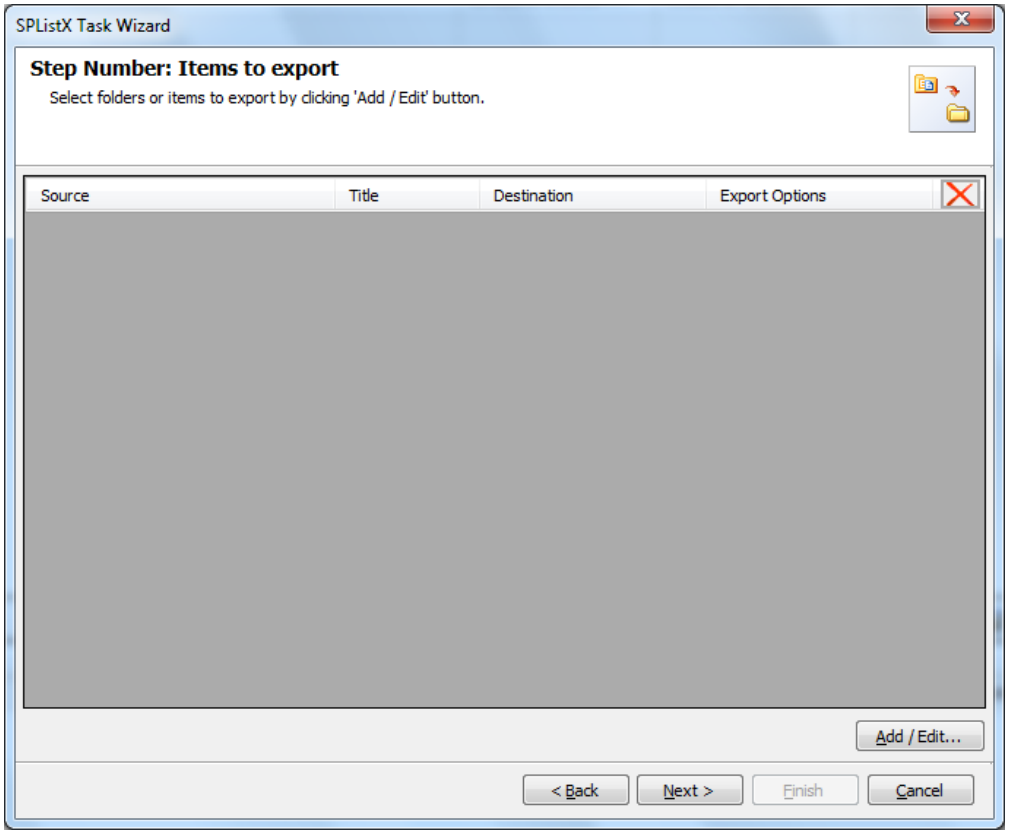

https://vyapin.sharepoint.com
Office 365
Sign in with your organizational account
someone@example.com
Password
Keep me signed in
Sign in
Can't access your account?
Don't have an account assigned by your organization?
Sign in with a Microsoft account
Organizational accounts that work here can be used anywhere you see this icon. © 2014 Microsoft Legal Privacy Feedback
Connect

Provide **User ID** and **Password** in the respective textboxes and click **Sign in** button to proceed.

3.1.3 Items to Export

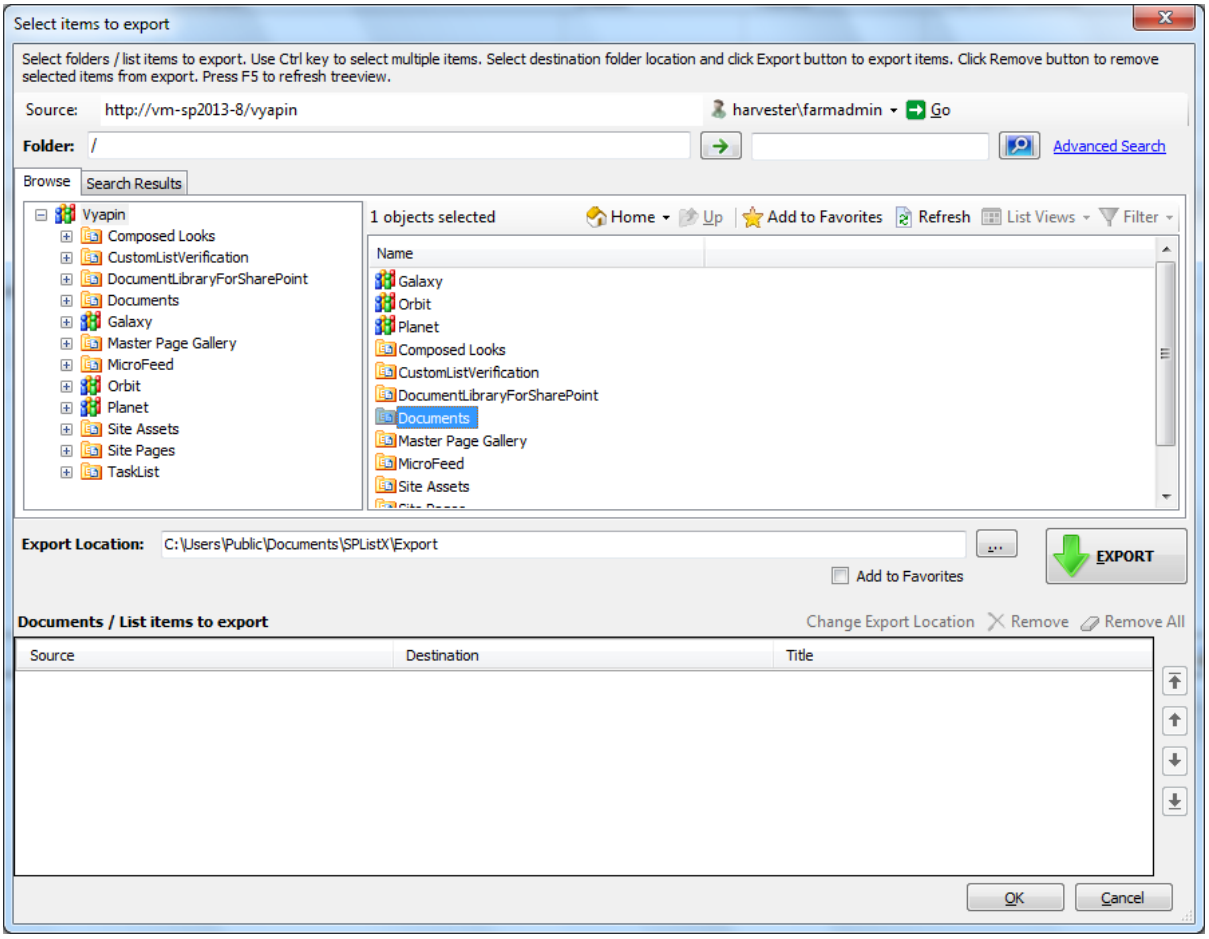
To add folders and items to export to the destination location in the file system:

1) The **Items to export** step appears as shown below:

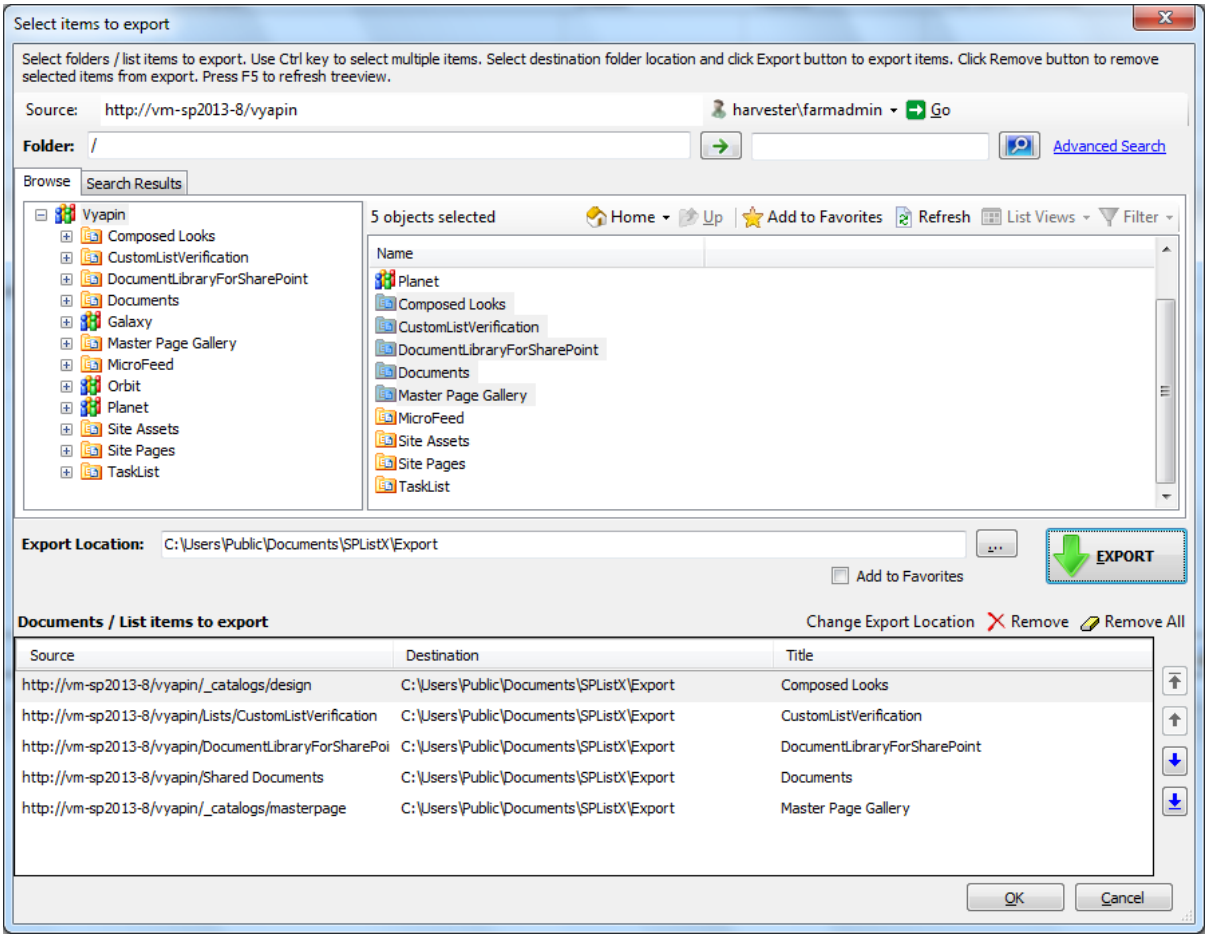


2) Click **Add / Edit** button to add and remove the folders and items for export.

3) The **Select items to export** dialog appears as shown below:

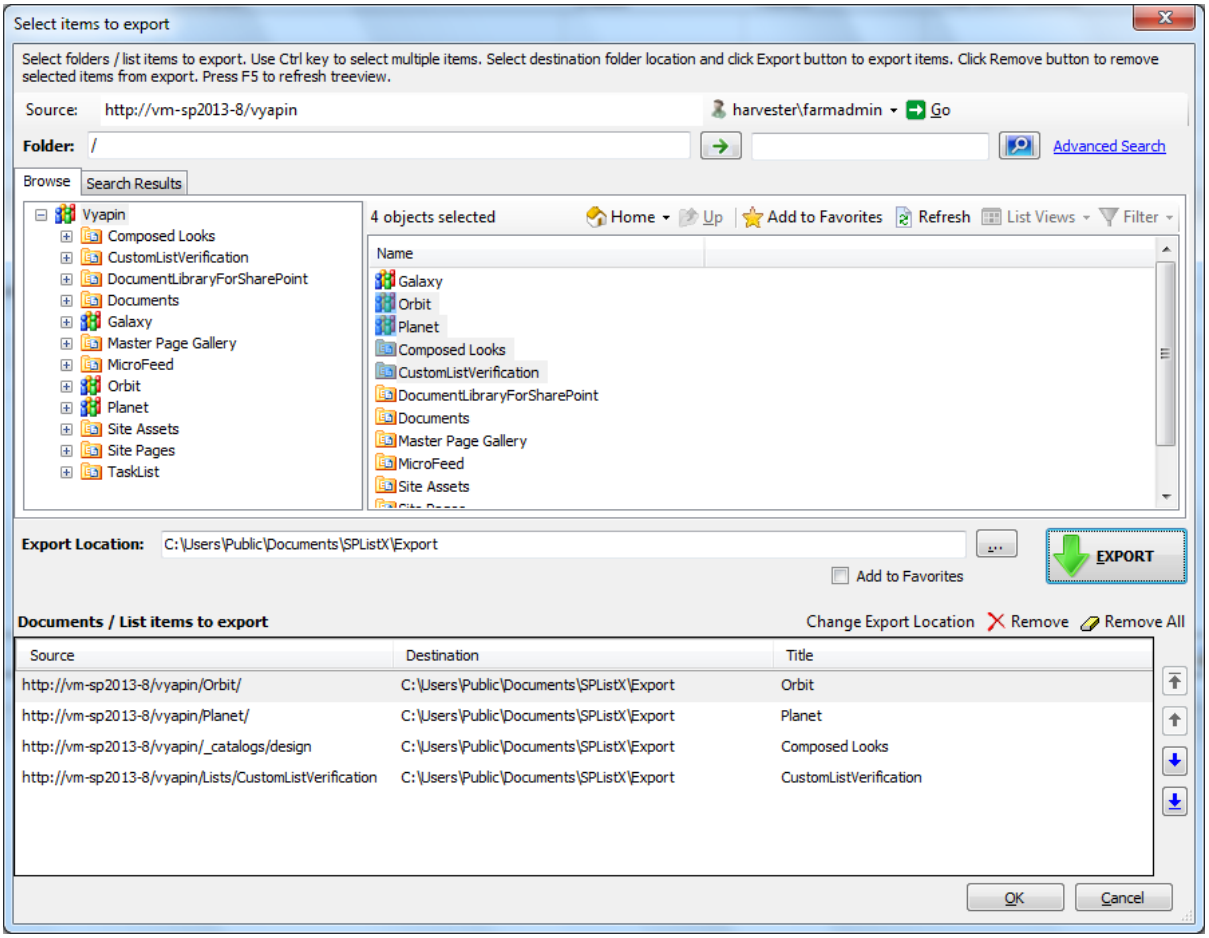


4) **Select items to export dialog** contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select site collection folder / file / list item to export. The Folder textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and Click the arrow button to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders. The search textbox allows you to search for list items for the keyword specified in search textbox. Advanced Search Link will be enabled for site that has office search service. You will also see a textbox (middle) and browse button, which enables selection of destination location to export folders / items.



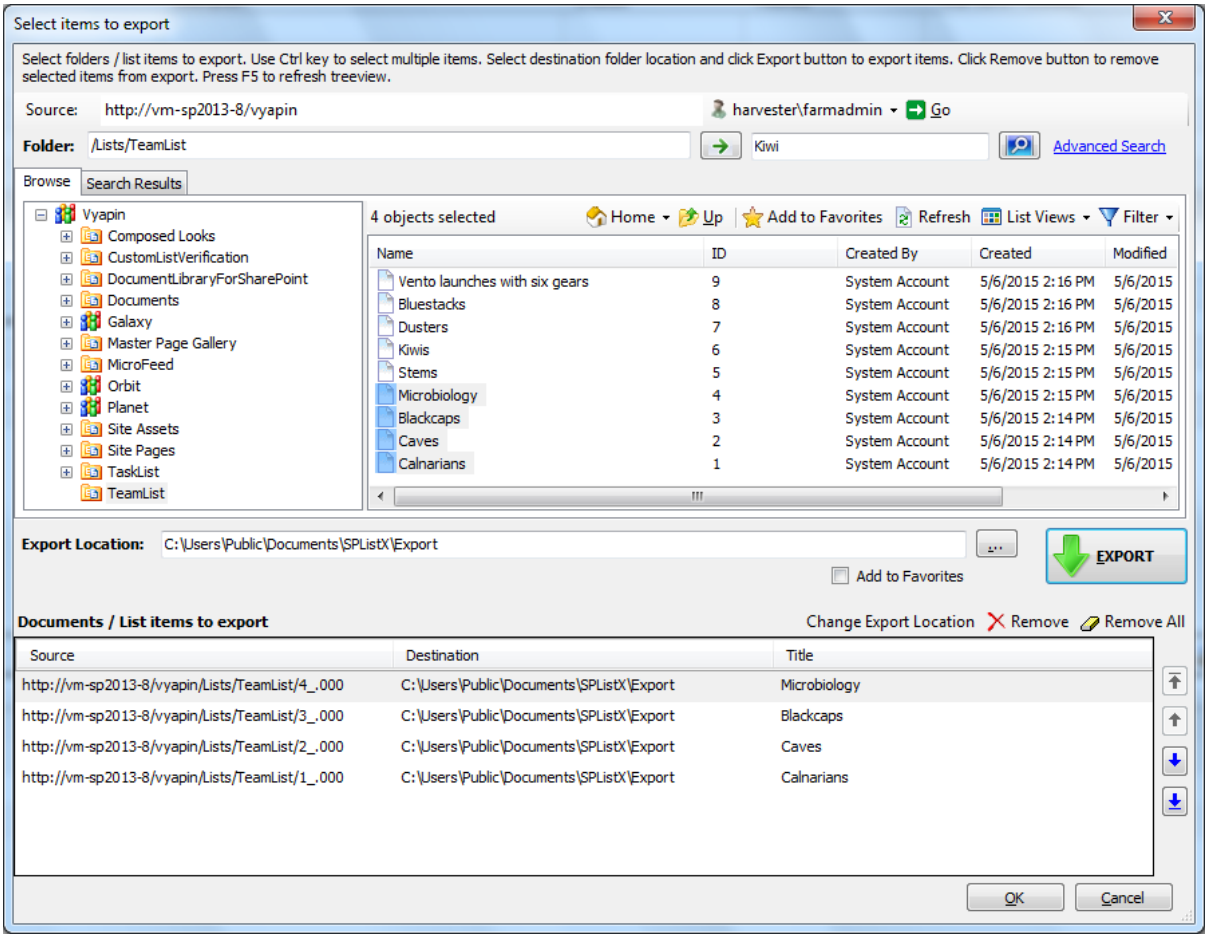
5) Browse the source folders and list items of connected SharePoint list and select the required folders and list items from either tree view (top left pane) or list view (top right pane). Select a destination location using browse option or enter the destination location path in the textbox and click Add button to export selected items.

All folders, files, list items including attachments, lists of a site and its sub-site can be exported by selecting Site collection node from tree-view. In SharePoint 2003, all folders, files, list items including attachments, lists of an area and its sub-area can be exported to file system.

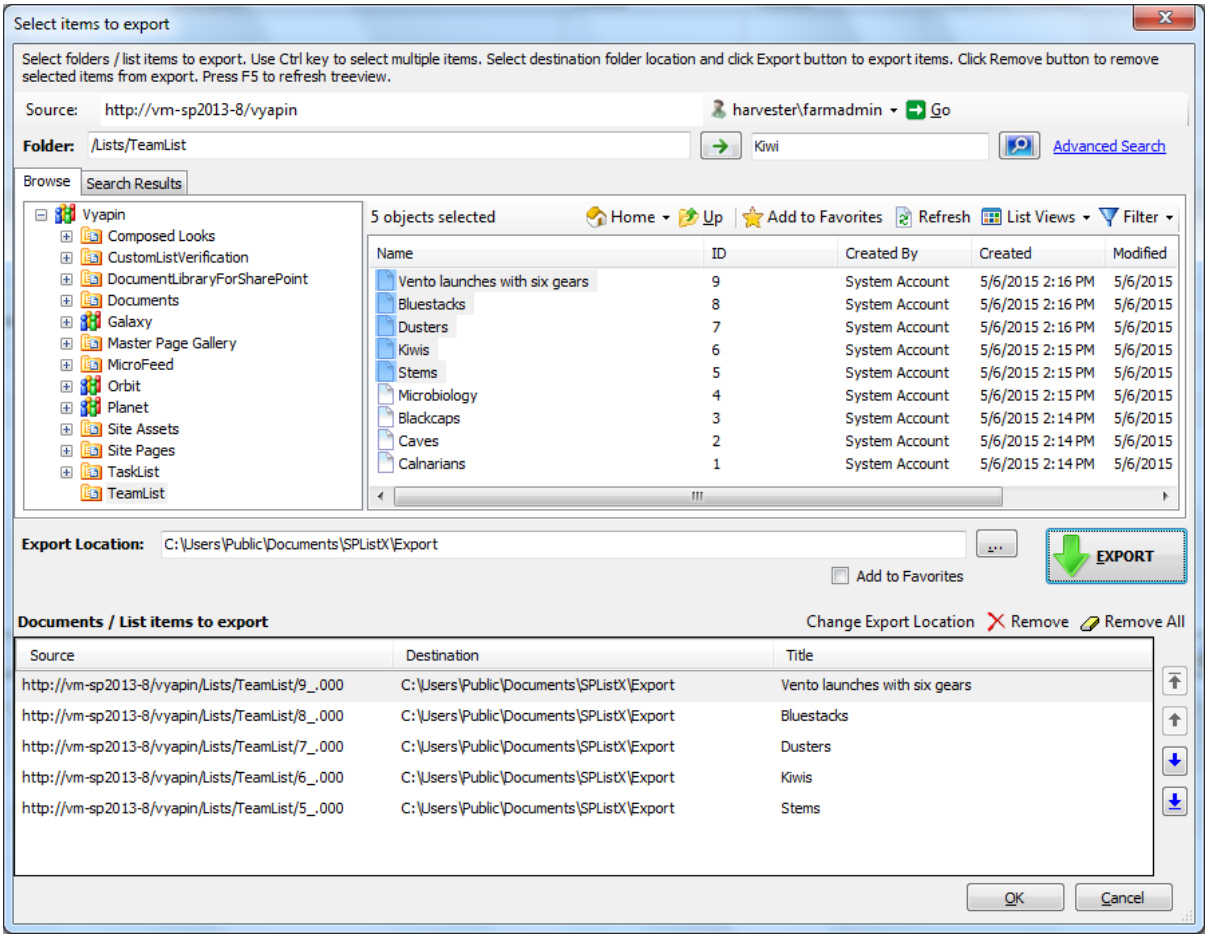


6) You can perform keyword search by entering search keyword in search keyword textbox and selecting the list items based on search results for exporting to the file system.

Note: Exporting based on search results is not applicable for SharePoint 2003.

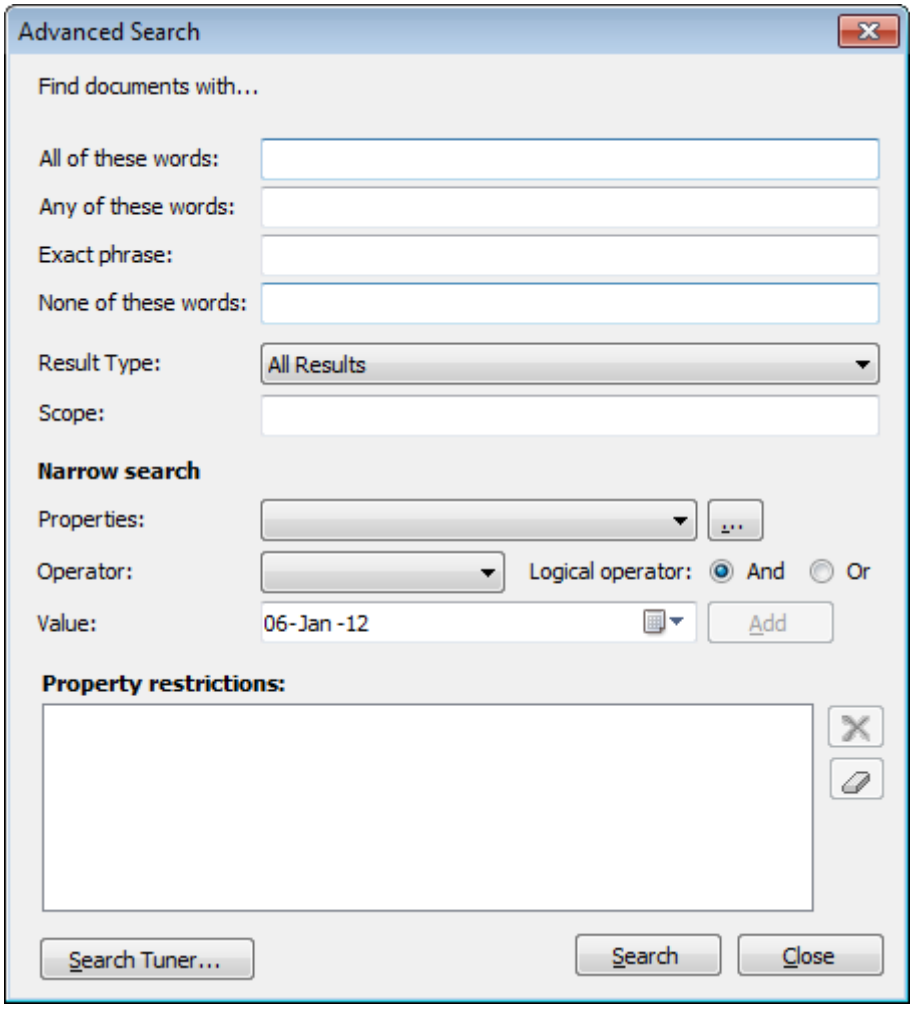


You can also enhance your keyword search by specifying Managed Property with value in keyword search textbox.

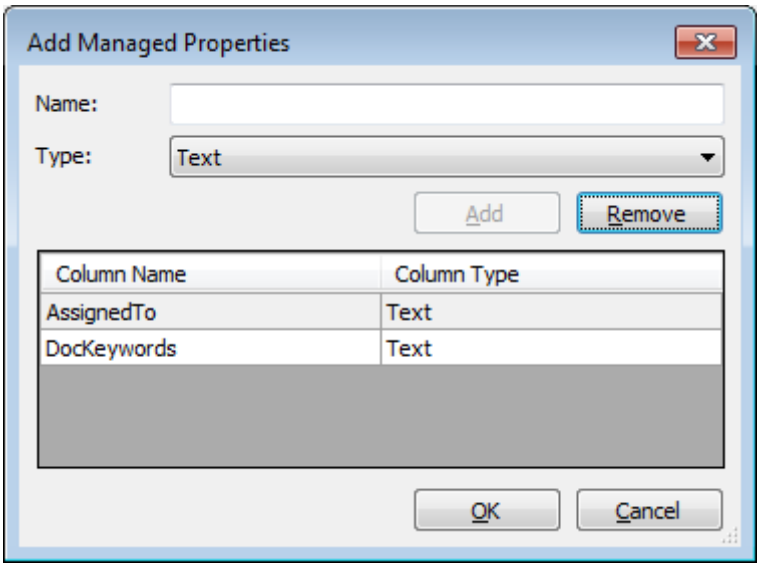


If advanced search is enabled in SharePoint site then you can perform advanced search by clicking Advanced search link.

The **Advanced Search** dialog appears as shown below:



Click (...) button to add the SharePoint managed properties in properties drop-down. The **Add Managed** Properties dialog appears as shown below:

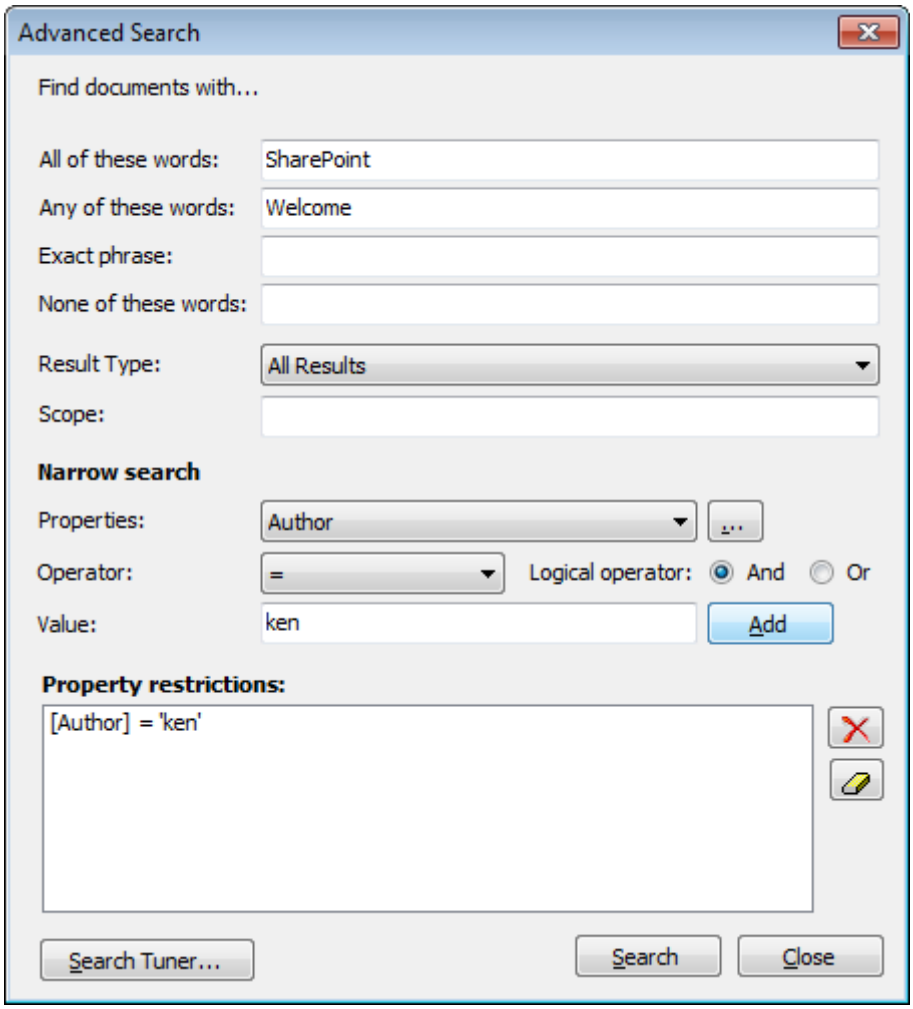


Specify the managed *property name* in **Name** textbox and select the data ***type*** of the column in SharePoint in the **Type** drop-down.

Click '**Add**' button, to add the managed property, to the property drop-down.

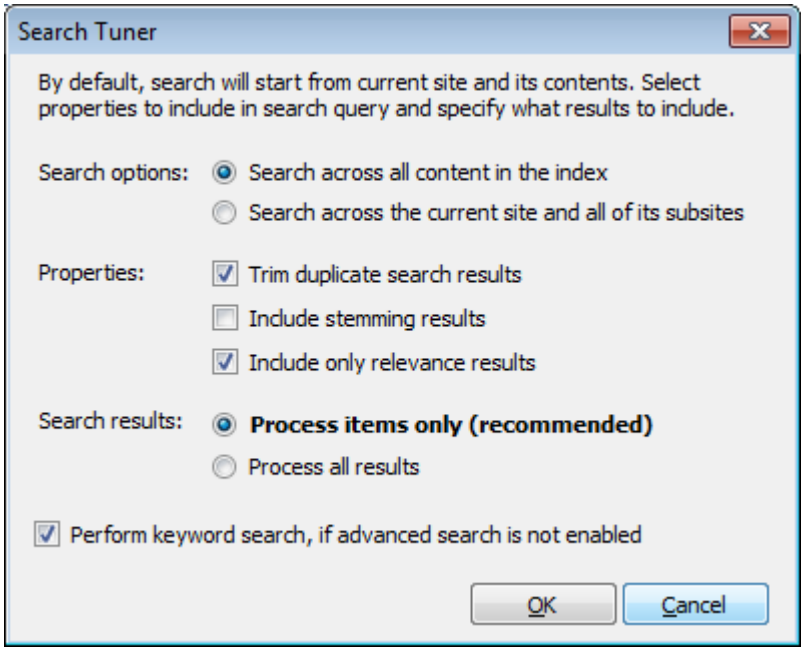
Click 'Remove' button to remove the columns from the property drop-down.

You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed by using logical operator 'AND' or 'OR'.



You can Tune search by clicking **Search Tuner**... button.

The **Search Tuner** dialog appears as shown below:


Search Tuner
By default, search will start from current site and its contents. Select properties to include in search query and specify what results to include.
Search options:
Search across all content in the index
Search across the current site and all of its subsites
Properties:
Trim duplicate search results
Include stemming results
Include only relevance results
Search results:
Process items only (recommended)
Process all results
Perform keyword search, if advanced search is not enabled
OK
Cancel

a) Search Options:

Search across all content in the index - By default, SPListX will search for list items across all the indexed content.

Search across the current site and all of its sub-site - SPListX will search for list items at current site and all of its sub-sites.

b) Properties:

Trim duplicate search results - By default, SPListX will remove the duplicate items from search results.

Include stemming results - By default, SPListX will not include the stemming results.

Include only relevance results - By default, SPListX will include only relevance results.

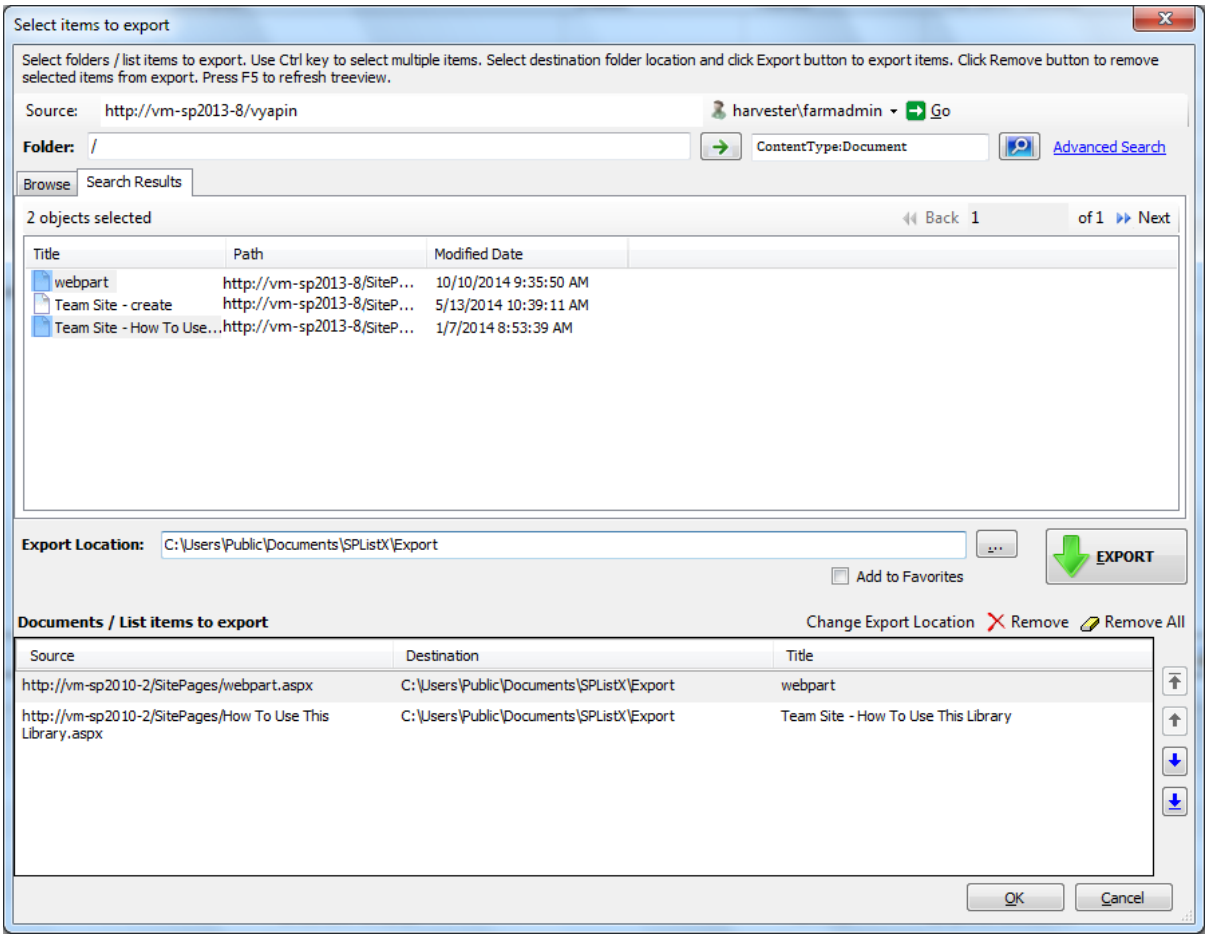
c) Search results:

Process only items (recommended) - By default, SPListX will search for list items only.

Process all results - SPListX will include all list view URLs, site URLs in search.

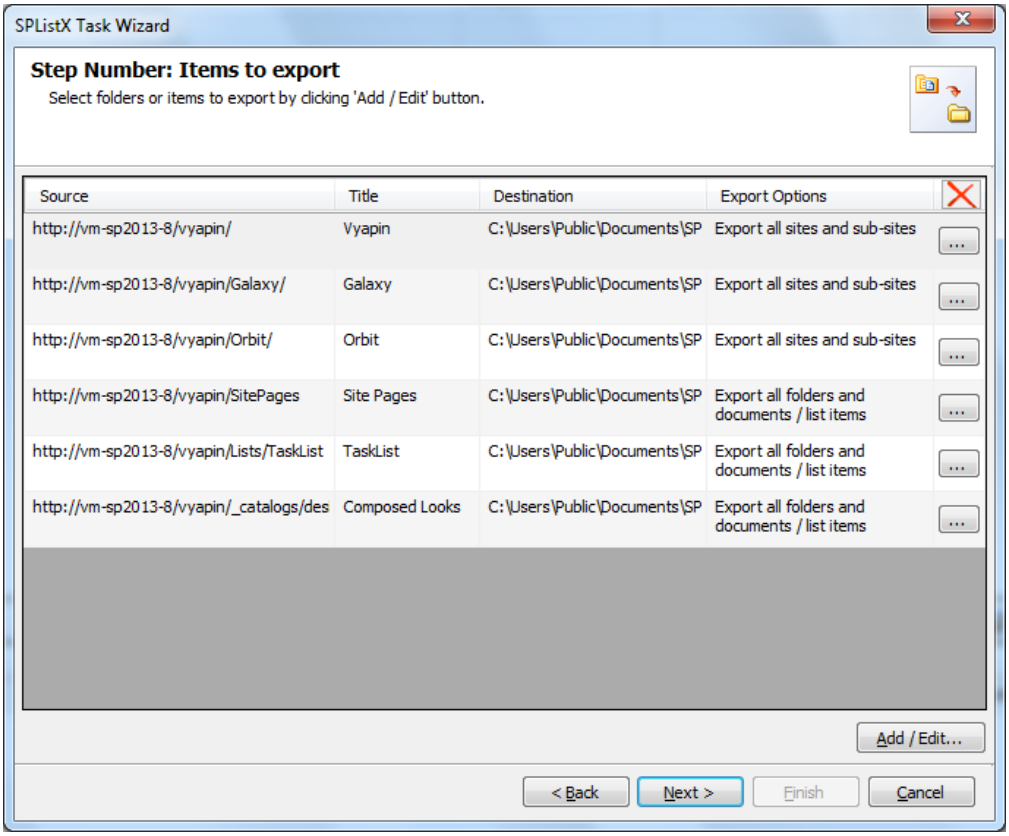
d) Perform keyword search, if advanced search is not enabled - To perform keyword search based on your keywords specified in All keywords textbox, Any

Keywords textbox, Exact Phrase textbox and it will ignore all the properties, scopes and result types specified in search query.



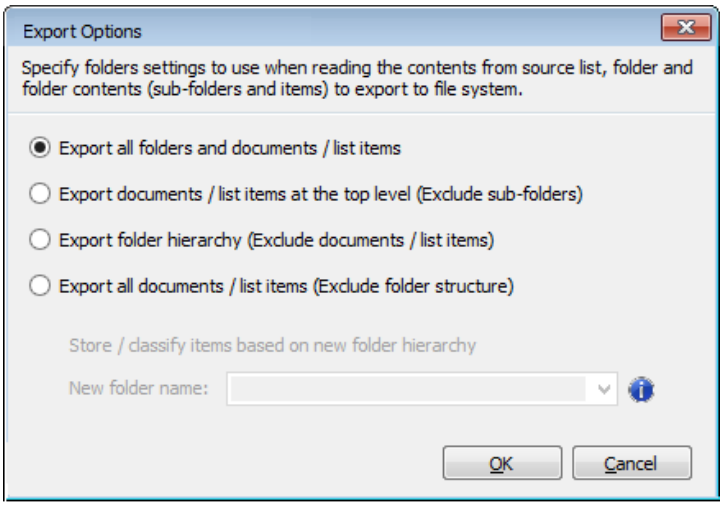
7) The selected top level site, sub-sites, lists, folders, files and list items added for export will be displayed in the Documents / List items to export grid. SPListX processes the top-level folders and list items added for export in the order in which it appears in the Documents / List items to export grid. The export process order can be changed by the navigation buttons available in the right side of the grid.

8) Items to export steps contains top level site, sub-sites, document library, folders and files added for export as shown below:



9) SPListX will export the folders, documents / list items and associated metadata based on Export Options.

Use button to edit the export options for lists and folders that are to be exported to the file system. An Export Options dialog appears as shown below:


Export Options
Specify folders settings to use when reading the contents from source list, folder and folder contents (sub-folders and items) to export to file system.
Export all folders and documents / list items
Export documents / list items at the top level (Exclude sub-folders)
Export folder hierarchy (Exclude documents / list items)
Export all documents / list items (Exclude folder structure)
Store / classify items based on new folder hierarchy
New folder name:
OK
Cancel

Select any one of the following options given below to specify the contents to be exported from the source folders in SharePoint:

a) **Export all folders and documents / list items -** This option exports folders and documents / list items exactly as they are in source SharePoint

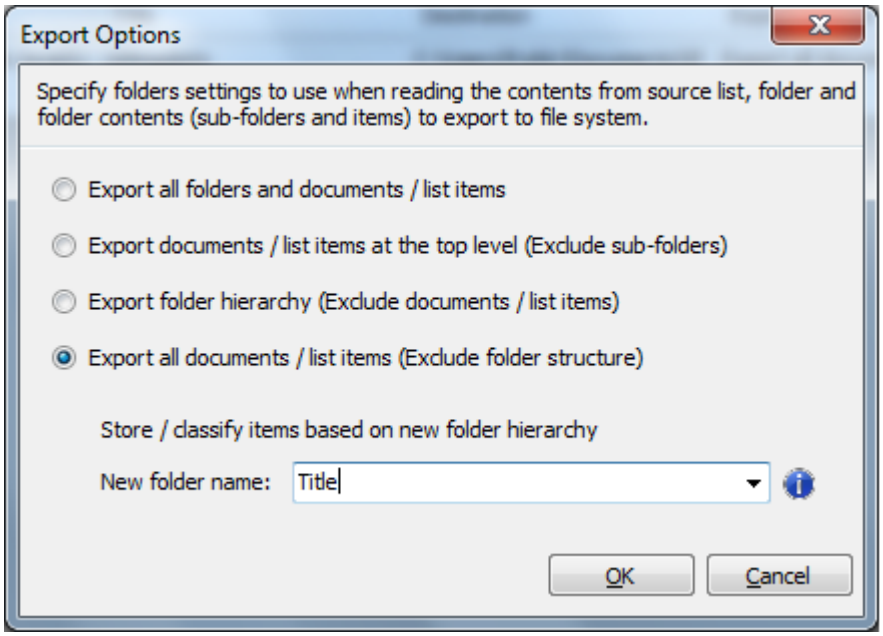
list / library. The source folder structure in the list / library will be retained in the destination location.

b) **Export documents / list items at the top level (Exclude sub-folders) -** This option exports documents / list items available in the top-level folders only. SPListX will not traverse the sub-folders within the top-level folders (i.e., will not export list items / documents located in the sub-folders).

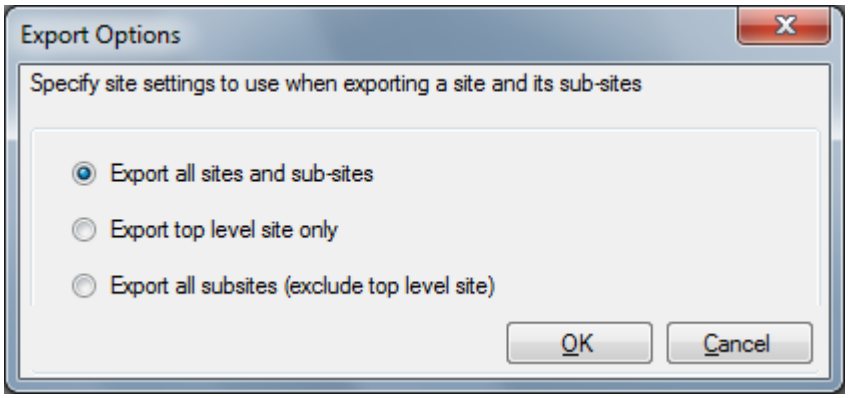
c) **Export folder hierarchy (Exclude documents / list items) -** This option creates the sub-folder structure alone in the destination location and ignores all documents / list items that are available within the added top level folder and sub-folders.

d) **Export all documents / list items (Exclude folder structure) -** This option exports documents / list items alone and ignores the folder structure in the source list / library. In case of duplicate file names, files gets exported based on the settings specified in File Settings wizard step.

Store / classify items based on new folder hierarchy - This option creates a folder in the file system based on the column value of the column specified under New folder name textbox e.g. Title as shown in screenshot below. The list items / documents will be exported to the respective folders based on the column value of the column in New folder name textbox. In case the column value is empty, the list items / documents will be exported to the folder named [Blank].


Export Options
Specify folders settings to use when reading the contents from source list, folder and folder contents (sub-folders and items) to export to file system.
Export all folders and documents / list items
Export documents / list items at the top level (Exclude sub-folders)
Export folder hierarchy (Exclude documents / list items)
Export all documents / list items (Exclude folder structure)
Store / classify items based on new folder hierarchy
New folder name:
Title
OK
Cancel

Use button to edit the export options for sites that are to be exported to the file system. Export Options dialog appears as shown below:


Export Options
Specify site settings to use when exporting a site and its sub-sites
Export all sites and sub-sites
Export top level site only
Export all subsites (exclude top level site)
OK
Cancel

Select any one of the following options given below to specify the contents to be exported from the source site in SharePoint:

a. Export all sites and its sub-sites - This option exports all the sites and its sub-sites specified under the given URL.
b. Export top level site only - This option exports only the top level site and excludes all the subsites in it.
c. Export all subsites (exclude top level site) - This option exports all the subsites specified under the given URL and it excludes the top level site.

10. Click **OK** button to proceed or click Cancel to discard the changes.

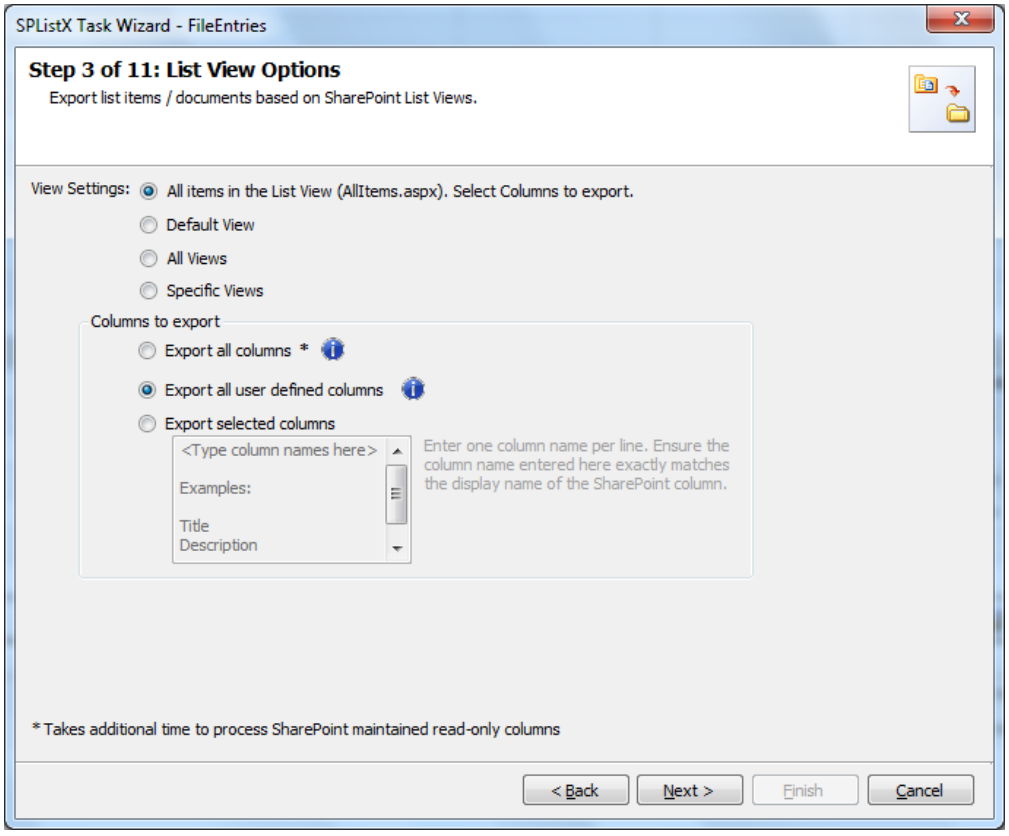
11. Click **Next** to proceed.

3.1.4 List View Options

You can export list items or documents based on SharePoint List views and thereby specify the SharePoint columns to export metadata.

To selectively export SharePoint Views from the list / library, follow the steps outlined below:

1) The **List View Options** wizard step appears as shown below:


SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
<Type column names here>
Examples:
Title
Description
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
*Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

2) Select any one of the following **View Settings** given below:

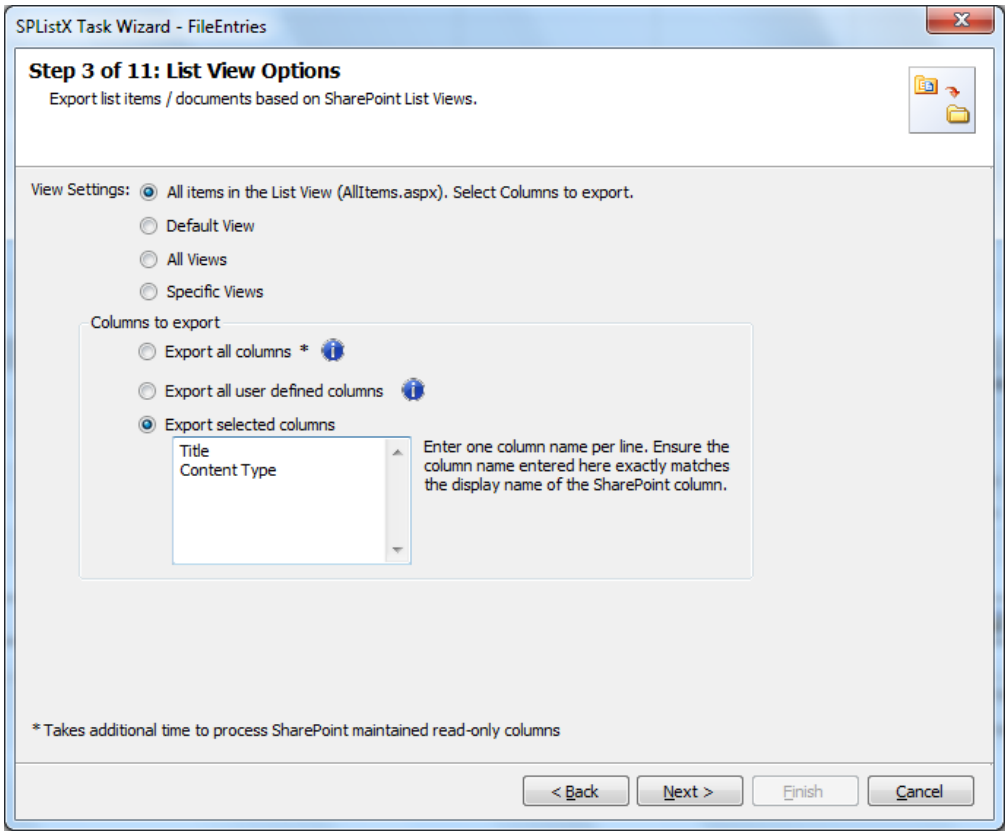
a) All items in the List View (AllItems.aspx). Select Columns to export.

Export all items / documents (including folders) in the list view as it appears in Allitems.aspx web page corresponding to the list. You have the additional option to specify the SharePoint columns to export as per the options below:

i. **Export all columns -** Exports all columns available in the source SharePoint list, including built-in SharePoint columns such as Created, Modified, Approval Status, etc.

ii. **Export all user defined columns -** Exports all columns that are created by a SharePoint user.

iii. **Export selected columns -** Exports columns that are specified in the textbox.


SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
Title
Content Type
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
* Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

b) Default View - Exports all items (including folders) available in the Default view of the given SharePoint list. The SharePoint columns defined in the default view will be exported to the metadata file.

c) All Views - Exports all Views in the SharePoint list. The SharePoint columns defined in the respective list views will be exported to the metadata file.

d) Specific Views - Exports views that are specified in the textbox. The SharePoint columns defined in the respective list views will be exported to the metadata file.

*** Note:**

ViewName macro is applicable only for View based export. SPListX will substitute the name of the processed view wherever applicable.

In view based export,

Content export:

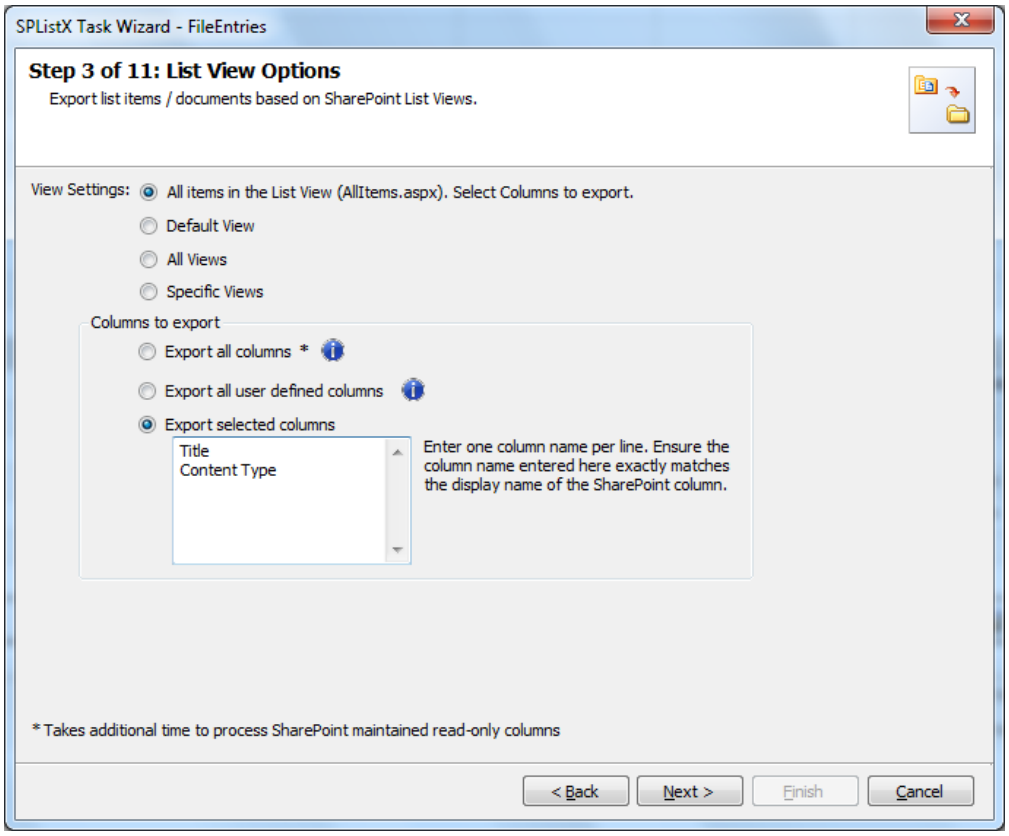
For list / library entries, it creates a new folder with the view name under the list / library name folder in the specified destination location.

For file / folder entries provided for export, it exports the content in the specified export location.

Metadata export:

For list / library entries and for files / folders within them, it exports metadata for columns present in the view.

For file / folder entries provided for export, it exports metadata for all columns (including SharePoint maintained read-only columns), instead of the view based columns.

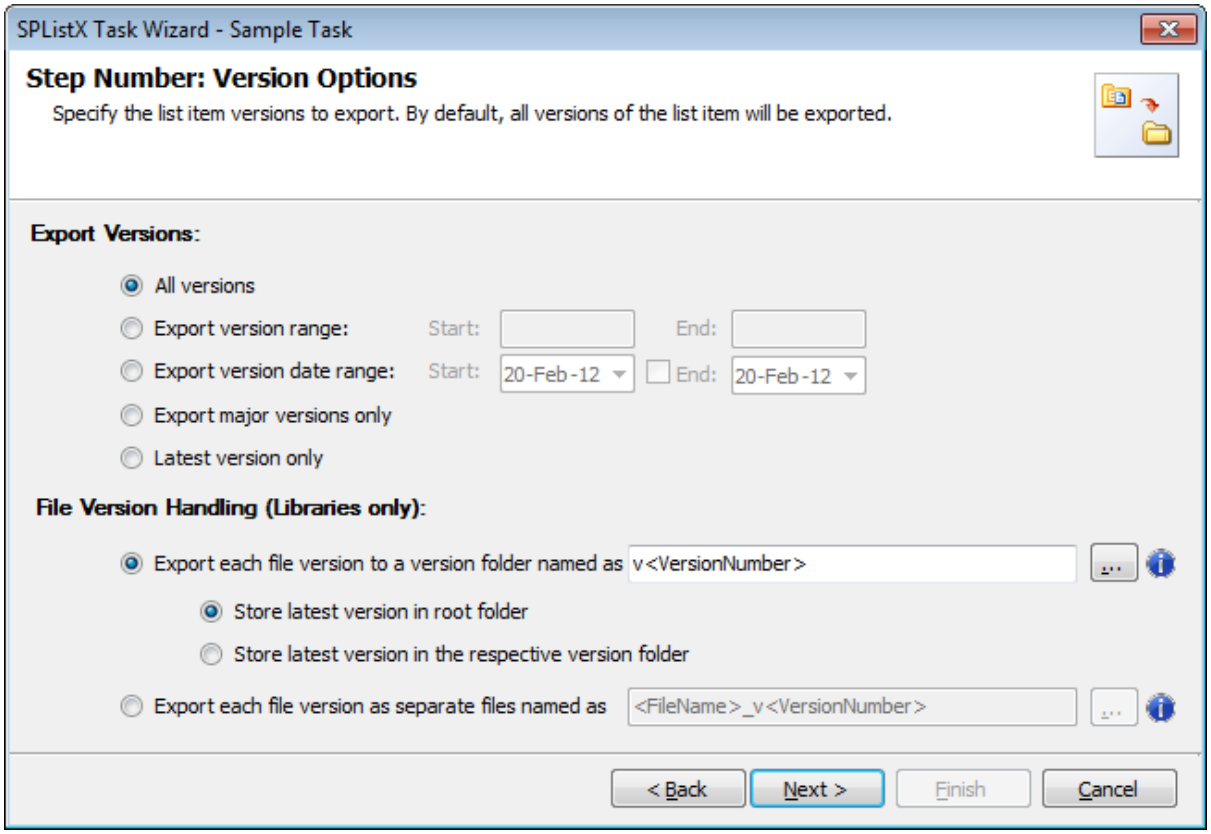

SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
Title
Content Type
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
* Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

Click **Next** to proceed.

3.1.5 Version Options

To selectively export list item versions to the destination file system location:

1) The **Version Options** step appears as shown below:



2) Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list item exported from the list. Select any one of the following version settings:

a) All versions - Export all list item versions available in the source list.

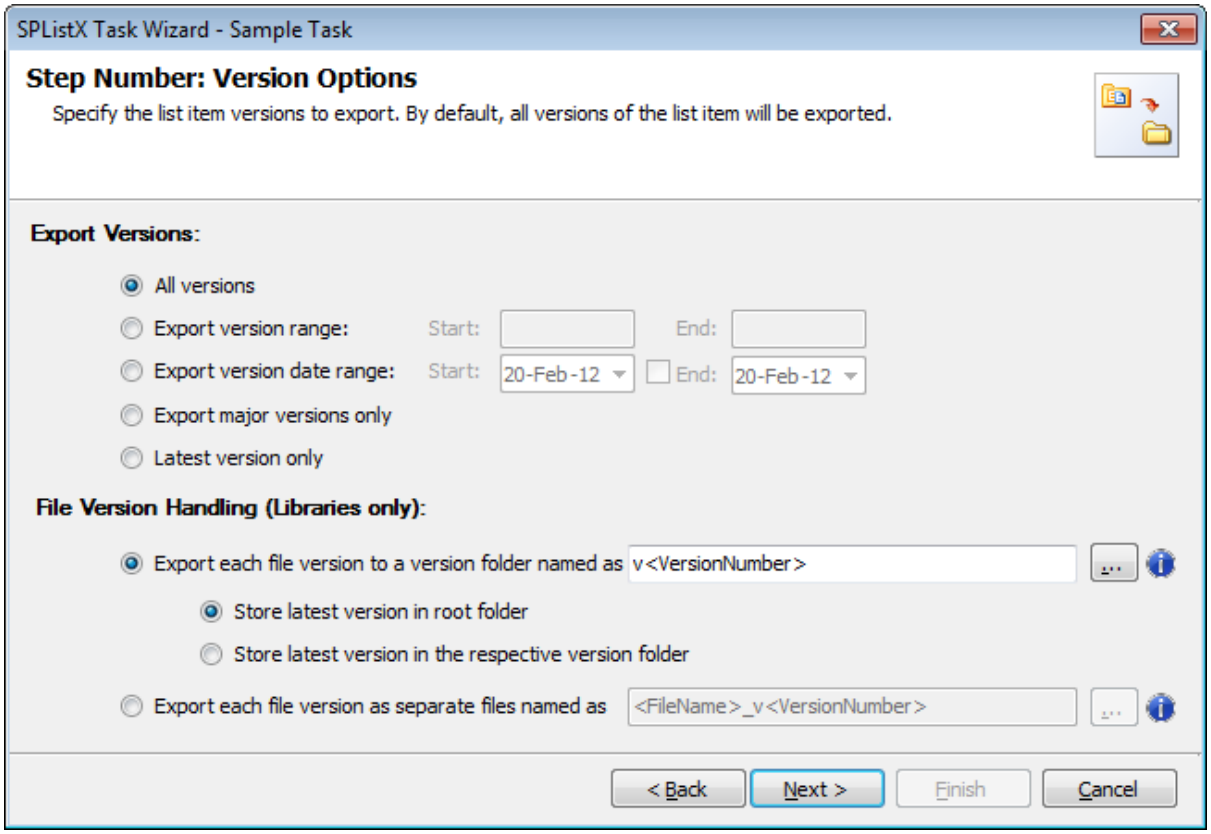
b) Export version range - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.

c) Export version date range - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.

d) Export major versions only - Export the major list item version from the source.

e) **Latest version only -** Export the latest list item version from the source.

3) **File Version Handling:**

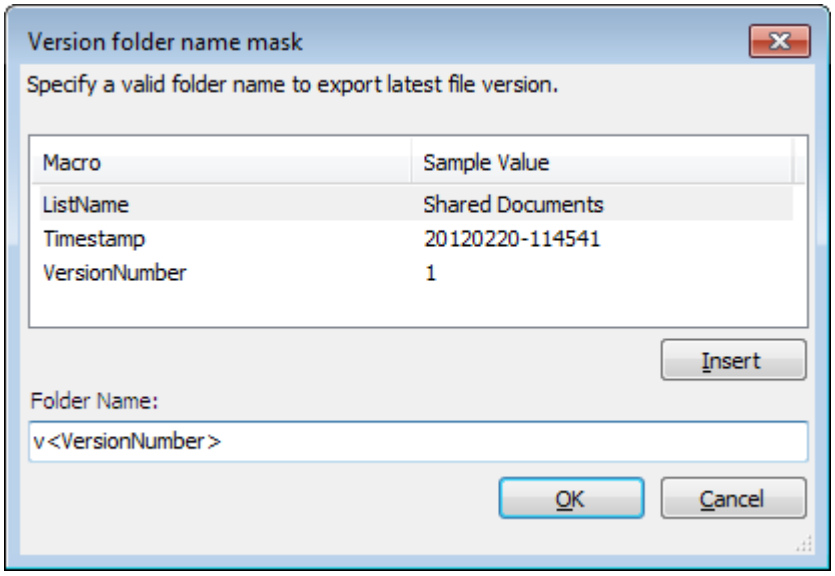


Select any one of the following export options:

a) **Export each version to a version folder named as -** This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.

(i) **Store latest version in root folder –** Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox.

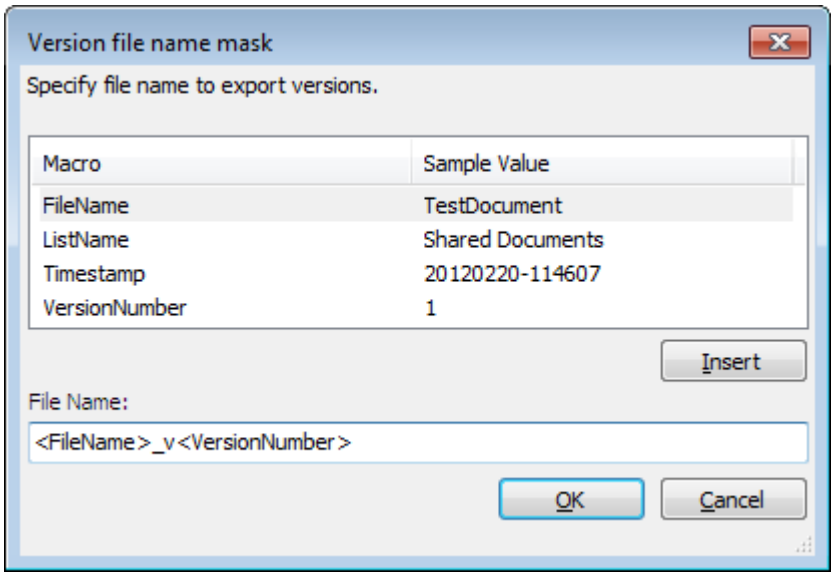
Version folder name mask dialog appears as shown below:



You can use the available macros to construct the new folder name in the **Result** textbox.

(ii) Store latest version in the respective version folder - This option will create a version folder name based on the current file version and export the file into the version folder.

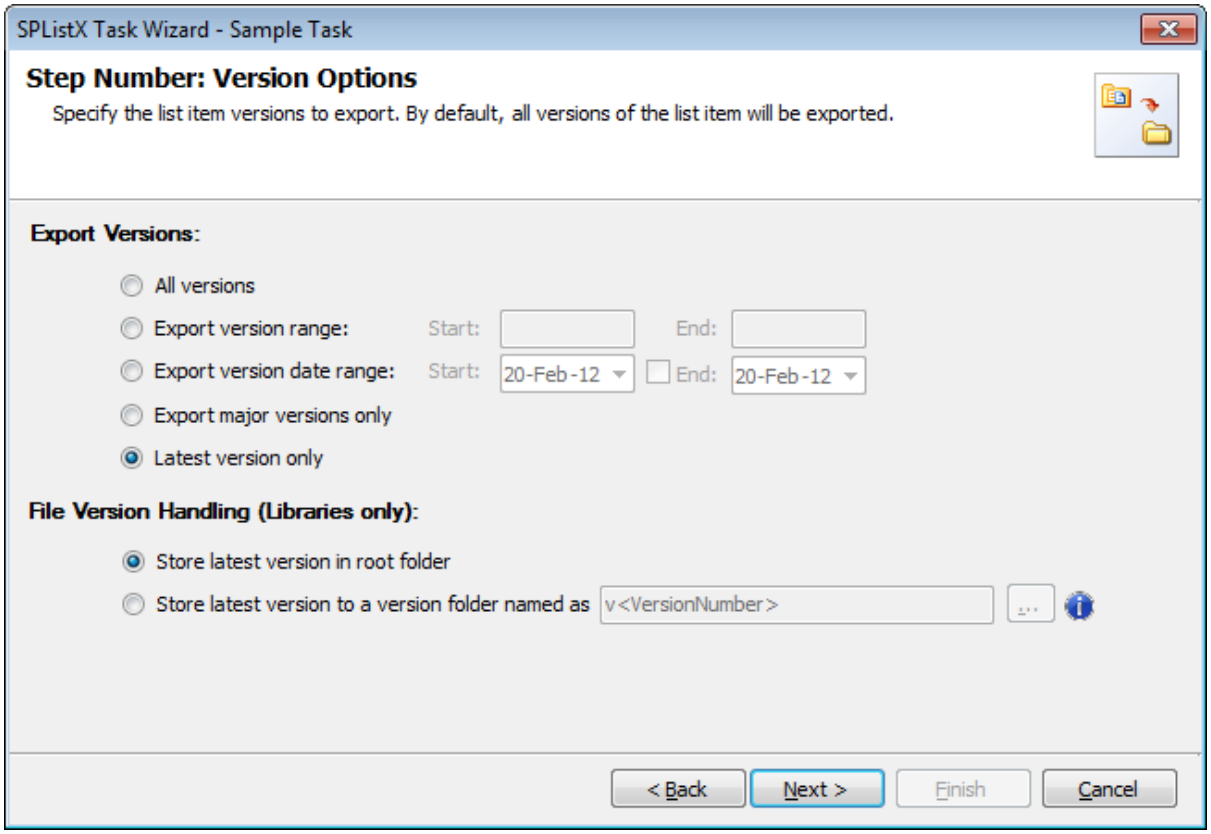
b) Export each file version as separate files named as - Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name**, click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below:



You can use the available macros to construct the new file name in the **Result** textbox.

4) Click **Next** to Proceed.

For **Latest Version Only** option in the Export Versions, you have the option to export the latest file version to the root folder or export it to the respective version folder. The File Version Handling settings appear as shown below:



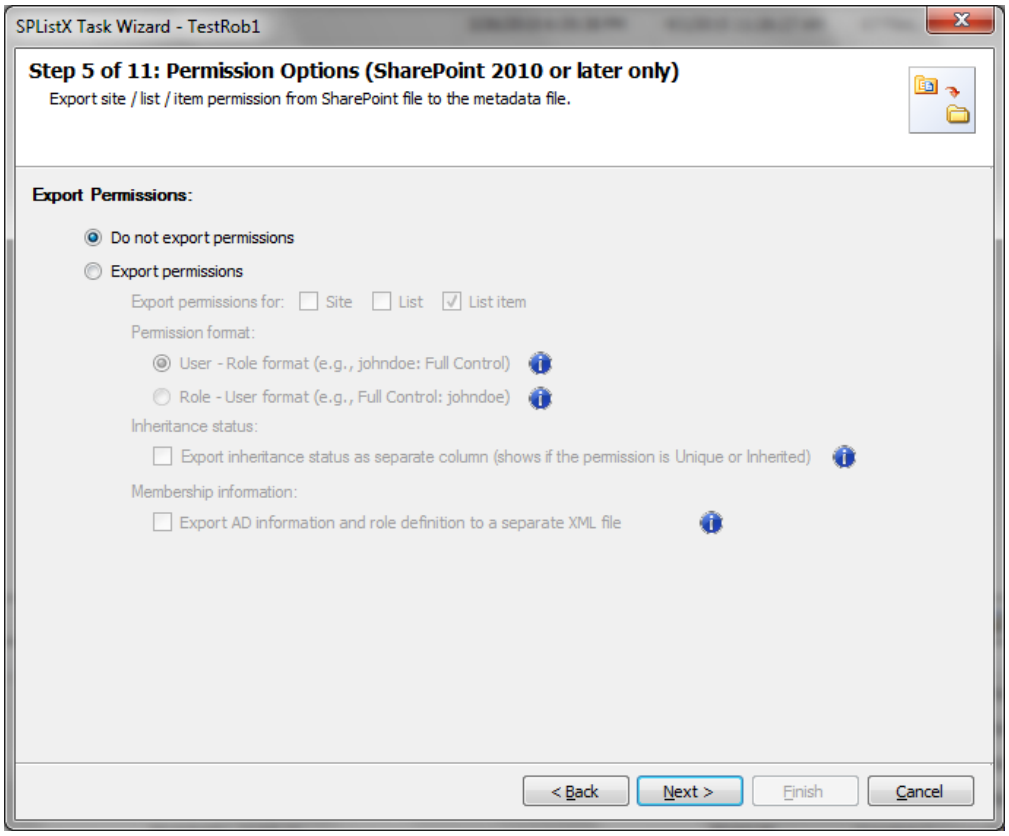
a) Store latest version in root folder - Export the latest version in the root folder itself

b) Store latest version in the respective version folder - Creates a latest version folder and export the latest file version in the latest version folder.

3.1.6 Permission Options

SPListX can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 or later.

1) The **Permission options** specification wizard step appears as shown below:

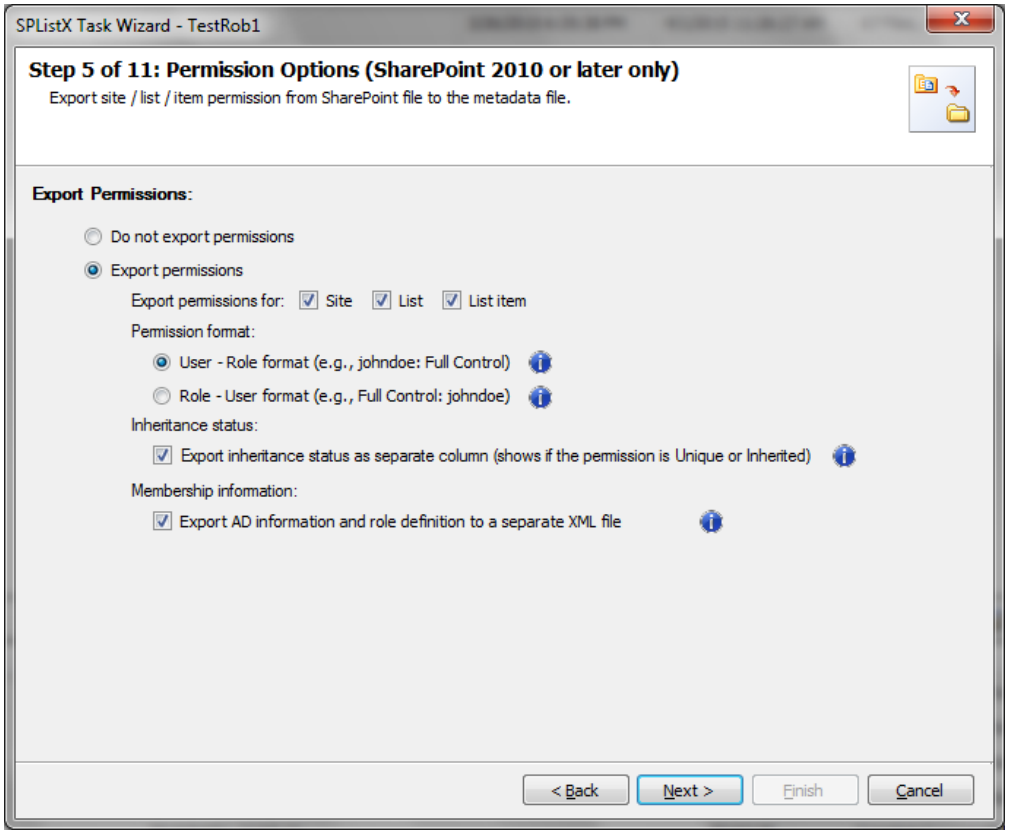

SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

Export Permissions:

a) Do not export permissions - This option will not export permissions to the metadata file.

b) Export permissions - This option will export permissions based on the user specified options.

The **Export Permissions** options appear as shown below:


SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permissions for:** options.

3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:

   a) User - Role format – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
   b) Role - User format – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.

4) Inheritance status - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.

5) Membership information - This option exports AD informtion and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name _membershipinformation and _roledefinition. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information. SPListX will

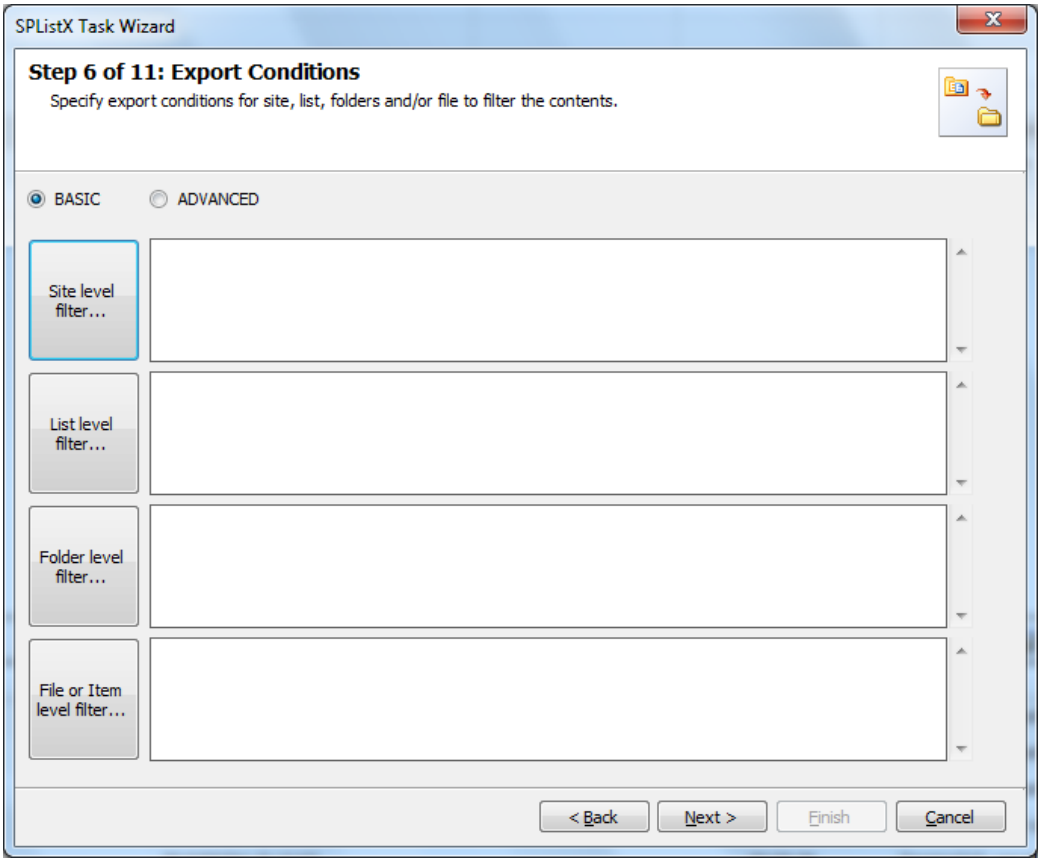
enumerate only the globally declared domain groups and retrieve membership information.

6) Click **Next** to Proceed.

3.1.7 Export Conditions

SPListX can export folders, files and list items (including file attachments) from a SharePoint list or library based on certain export conditions. The conditions can be created by using SharePoint columns in the source list or library.

1) The **Export Conditions** step appears as shown below:



2) You can specify one of the following methods of exporting conditions:

- BASIC
- ADVANCED

2.1) BASIC

You can specify export conditions at three levels:

Site Level Filter

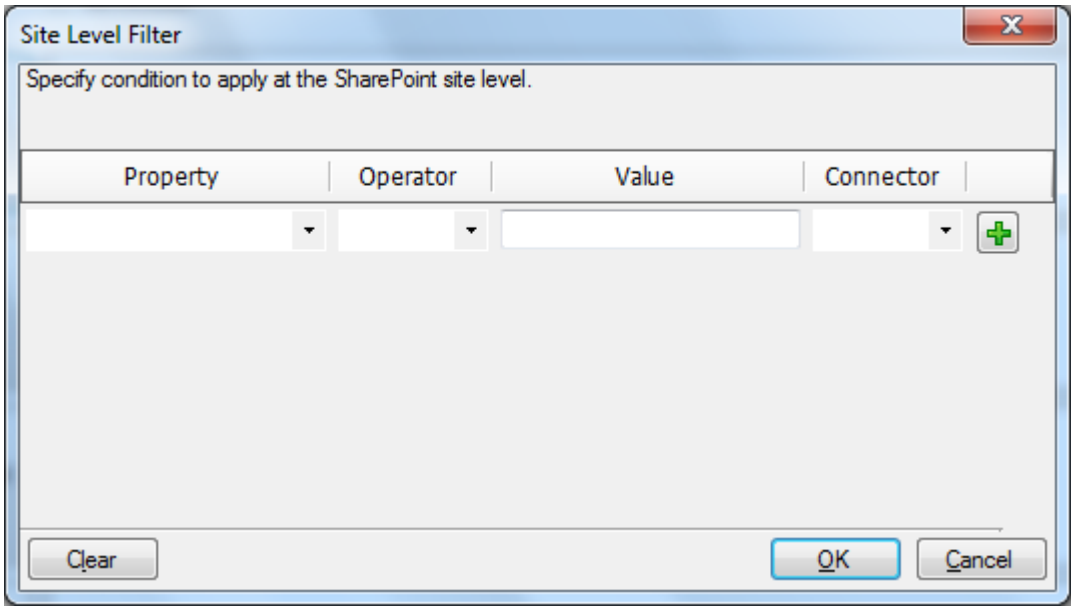
List Level Filter

Folder Level Filter

File or Item Level Filter

a. Site Level Filters

Click Site level filter to specify the filter conditions. The Site Level Filter dialog appears as below:



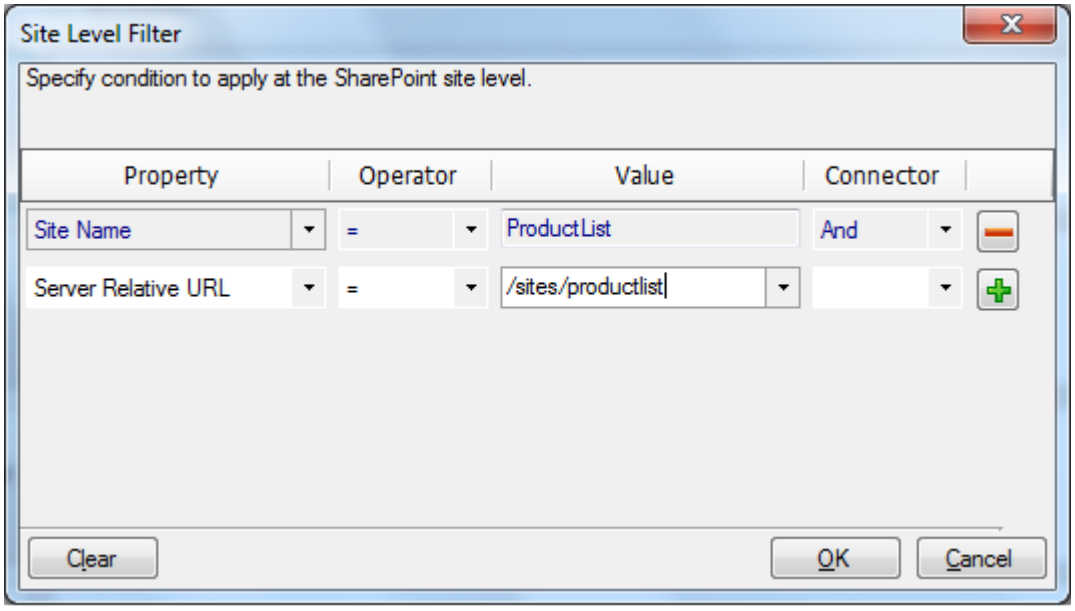
You can specify the export filters by selecting the site name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

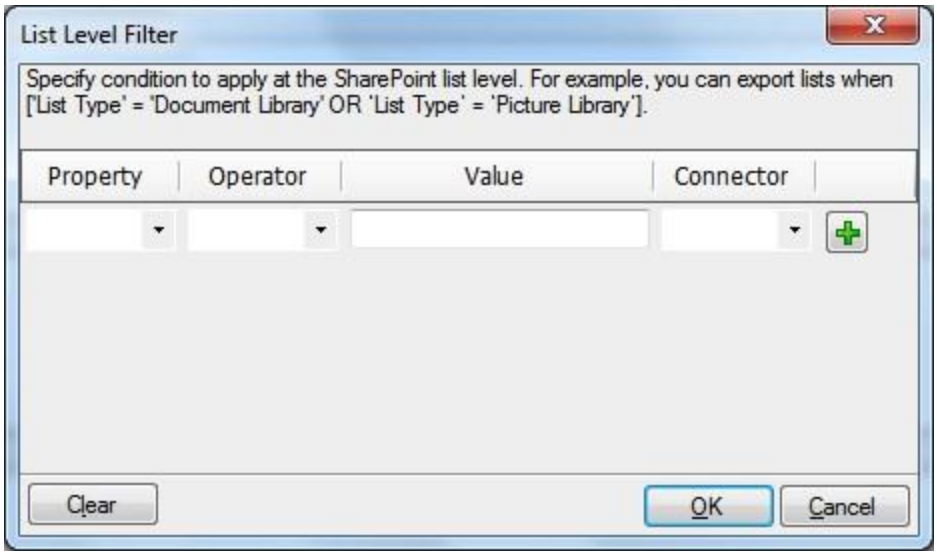
Click **Clear** to remove all the filters specified.



SPListX will export the sites that satisfy the export conditions depending on the option selected by the user.

b. List Level Filters

Click **List level filter** to specify the filter conditions. The **List Level Filter** dialog appears as below:


List Level Filter
Specify condition to apply at the SharePoint list level. For example, you can export lists when ['List Type' = 'Document Library' OR 'List Type' = 'Picture Library'].
Property
Operator
Value
Connector
Clear
OK
Cancel

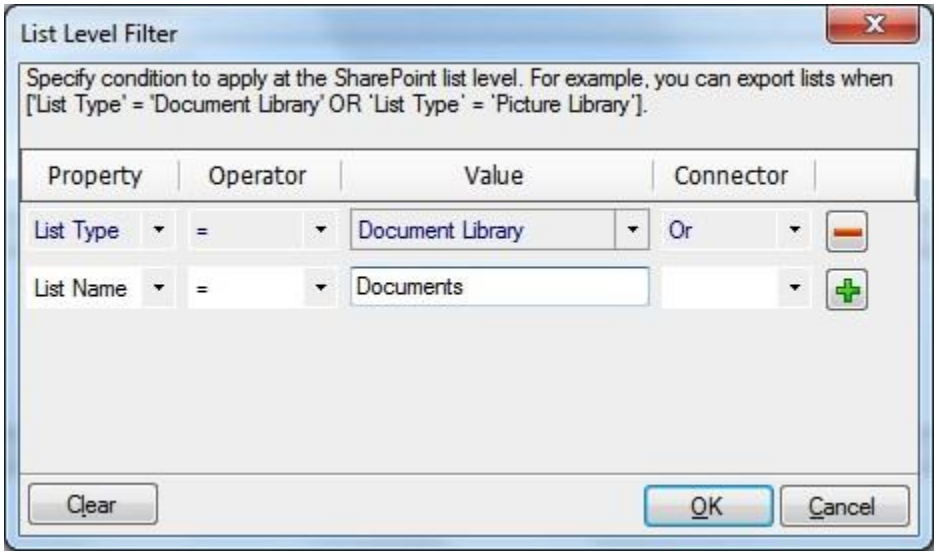
c. You can specify the export filters by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

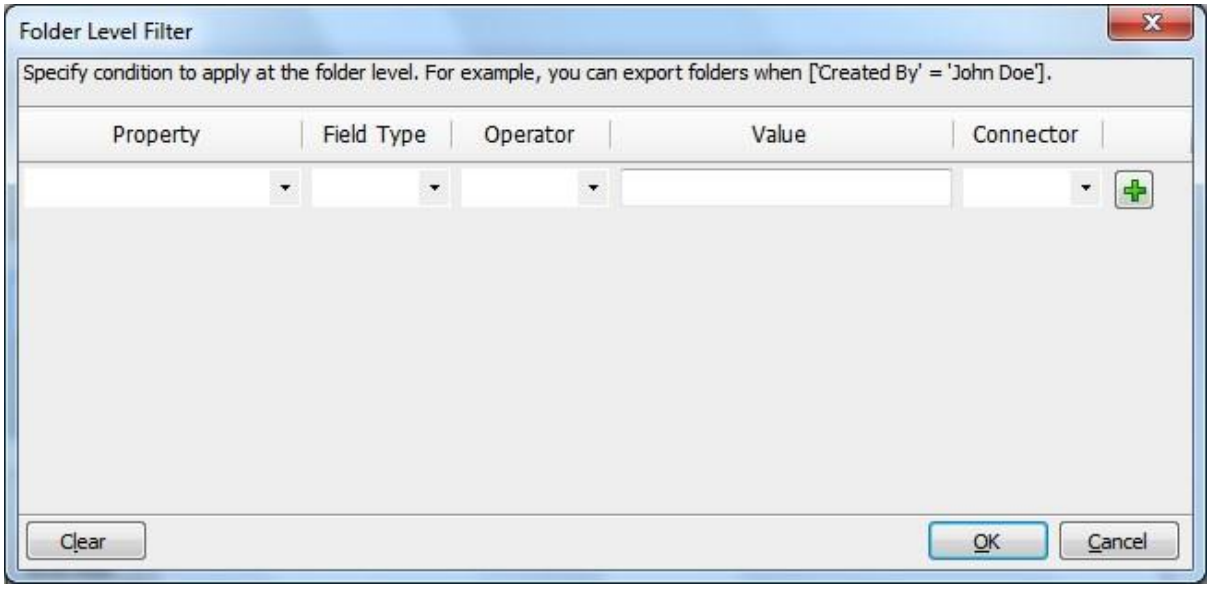
Click **Clear** to remove all the filters specified.



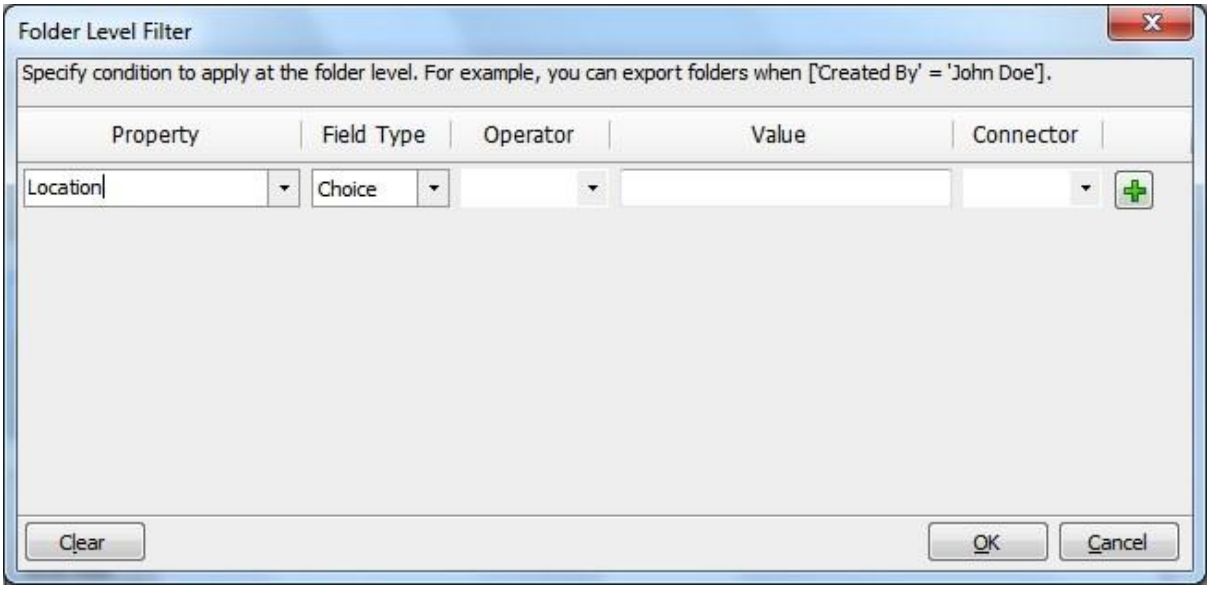
SPListX will export the lists that satisfy the export conditions depending on the option selected by the user.

d. Folder Level Filters

Click **Folder level filter** to specify the filters. The **Folder Level Filter** dialog appears as below:



d. You can enter the SharePoint Column Name in the Property drop down. Select the data type of the specified SharePoint Column in Field Type drop down.



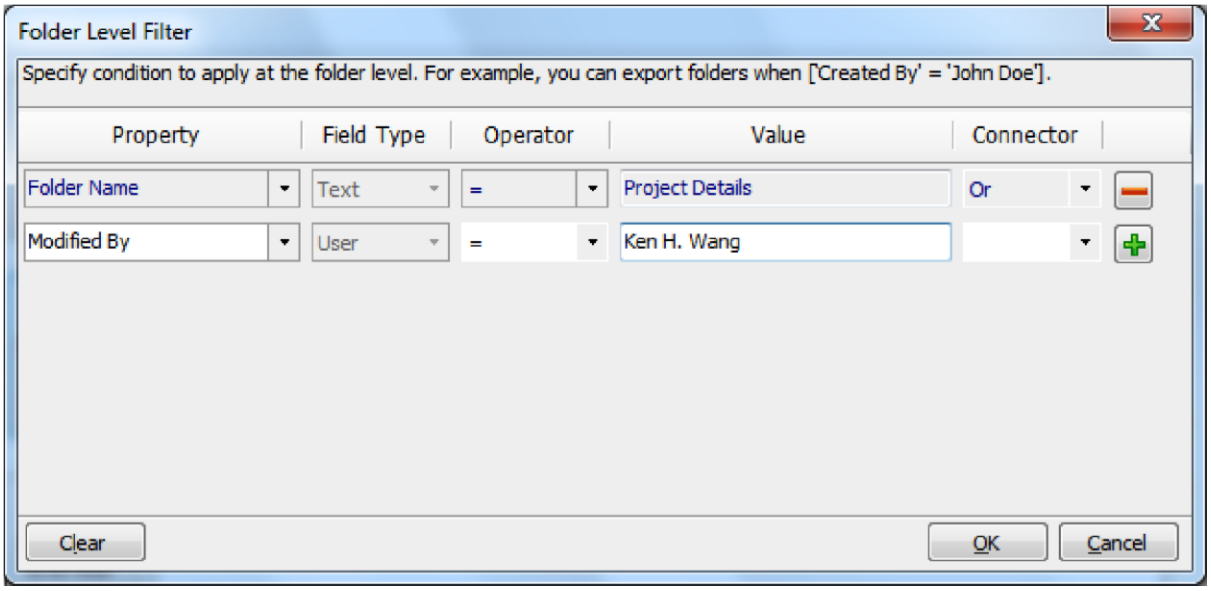
e. You can specify the export filters by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed with the use of logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

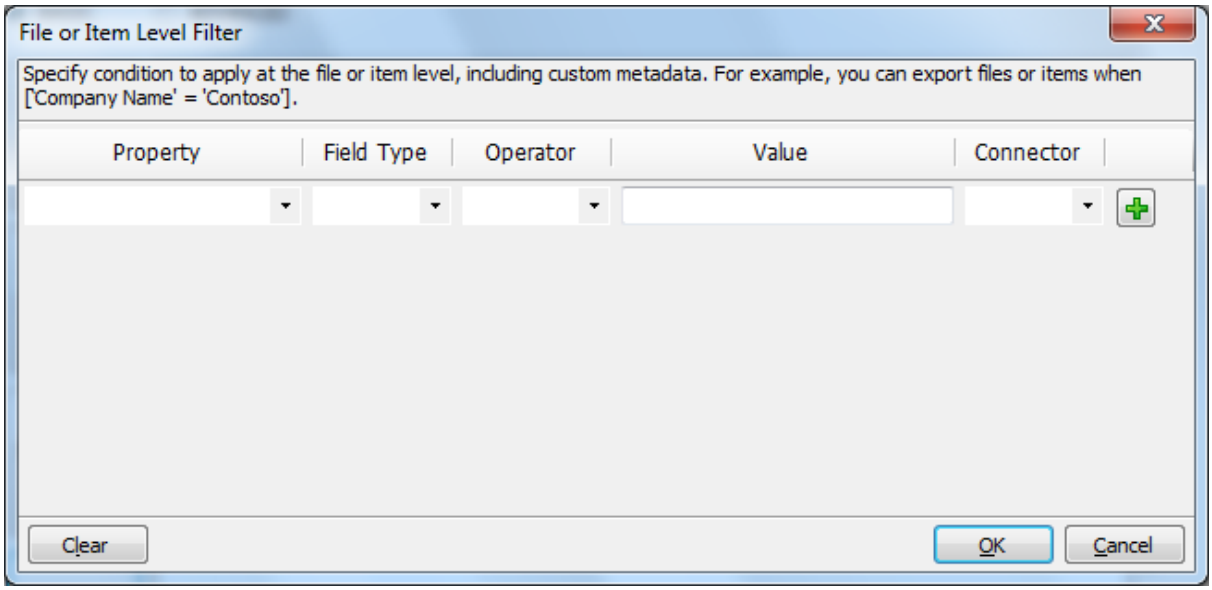
Click **Clear** to remove all the filters specified.



SPListX will export the folders that satisfy the export condition depending on the option selected by the user.

f. File or Item Level Filters

Click File or Item Level to specify the filters. The File or Item Level Filter dialog appears as below:


File or Item Level Filter
Specify condition to apply at the file or item level, including custom metadata. For example, you can export files or items when ['Company Name' = 'Contoso'].
Property
Field Type
Operator
Value
Connector
Clear
OK
Cancel

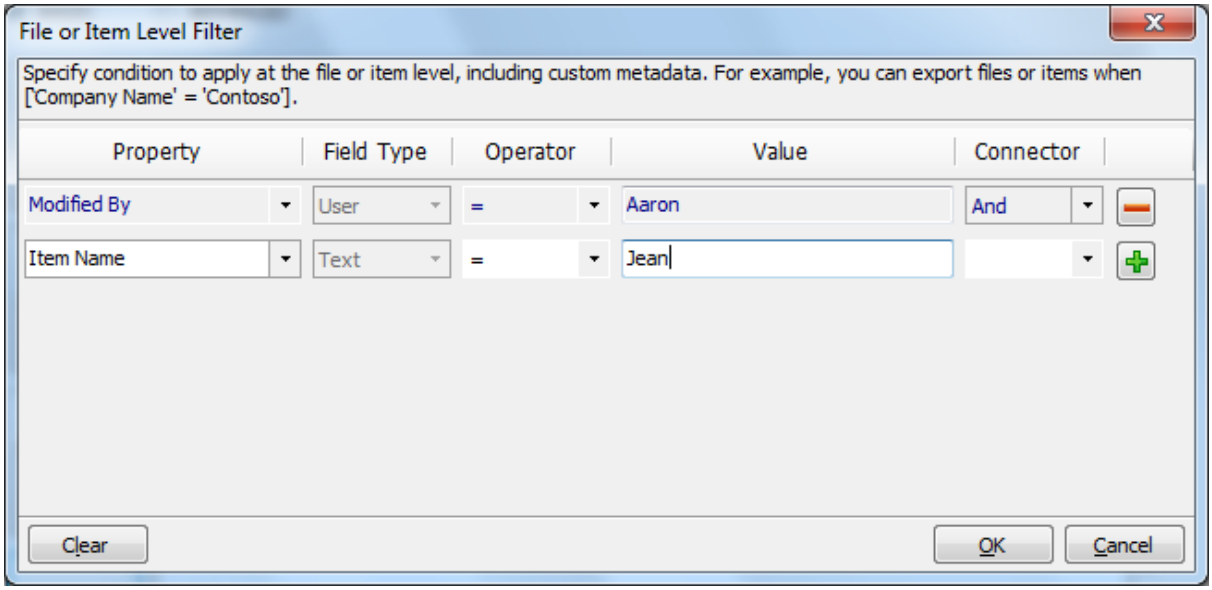
You can specify the export filters by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed with the use of logical operators 'AND' and 'OR'.

Click to add multiple filters.

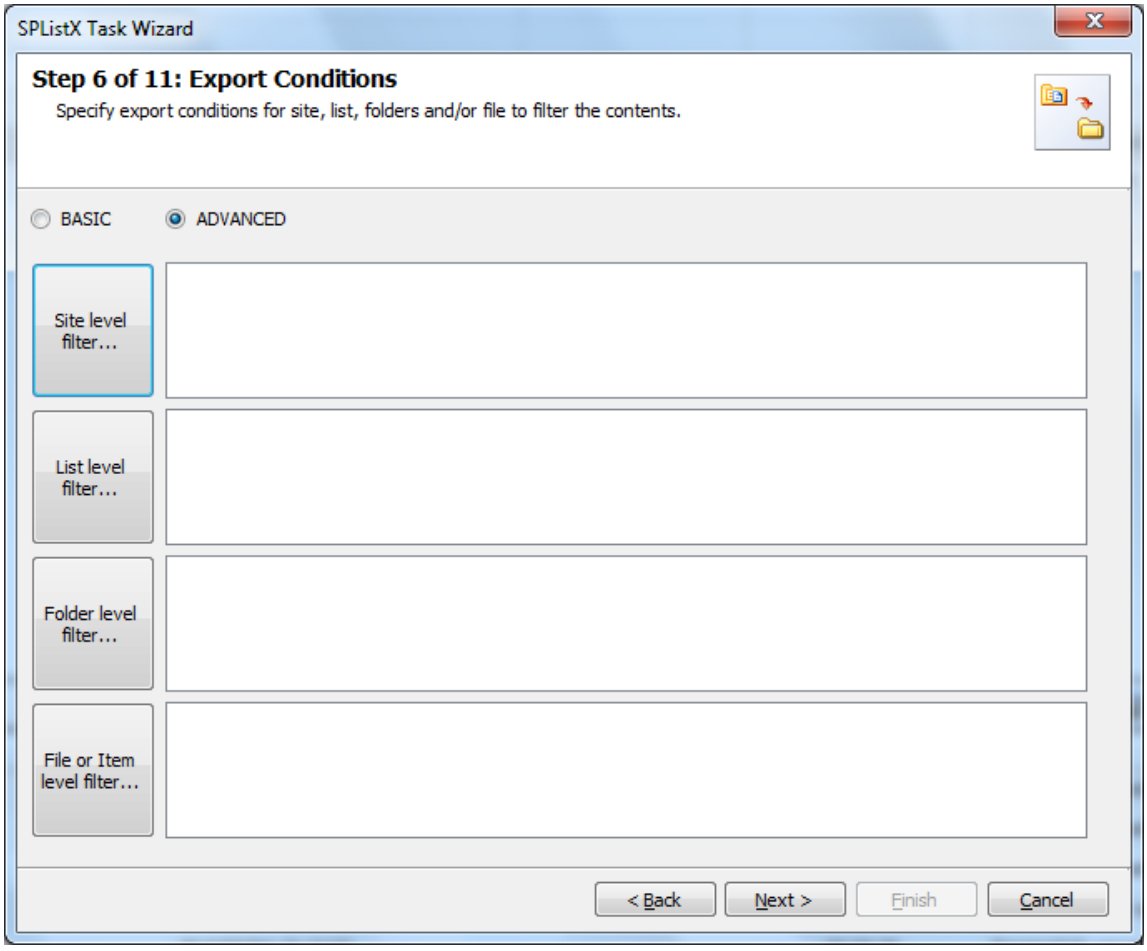
Click to remove the filter from the filter list.

Click **Clear** to remove all the filters specified.



SPListX will export the folders that satisfy the export condition depending on the option selected by the user.

ADVANCED



You can specify export conditions at three levels:

Site Level Filter

List Level Filter

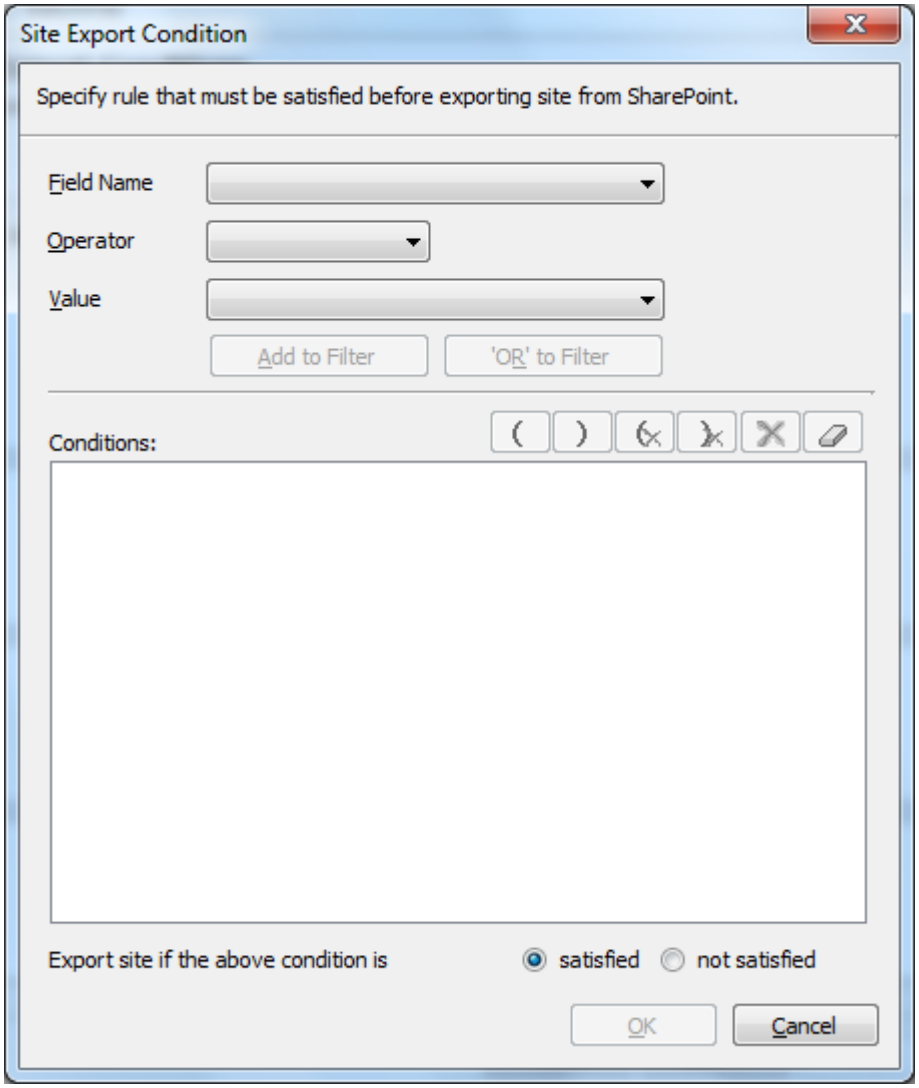
Folder Level Filter

File or Item Level Filter

a. Site Level Filter

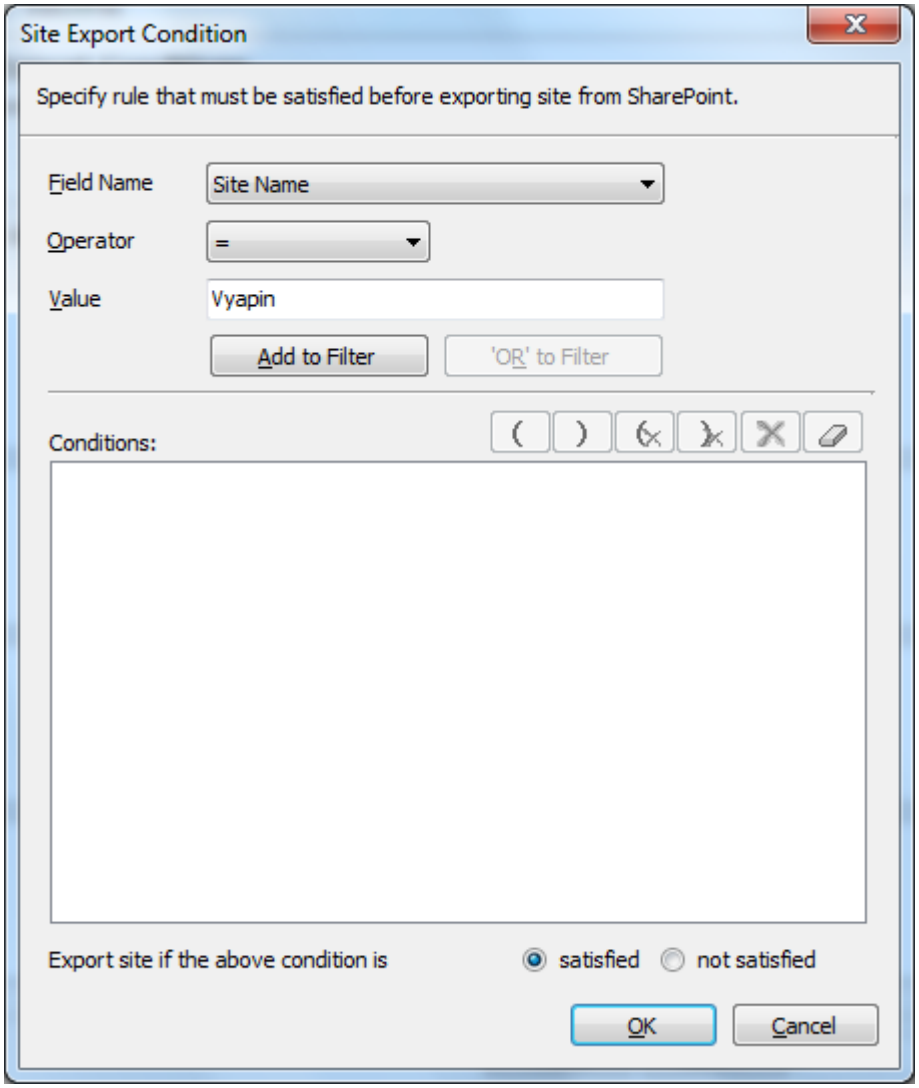
Click **Site level filter** to specify the conditions

The Site Export Conditions Dialog appears as shown below:



You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



SPListX will export the sites that satisfy the export condition or export the sites that do not satisfy the export condition depending on the option selected by the user:

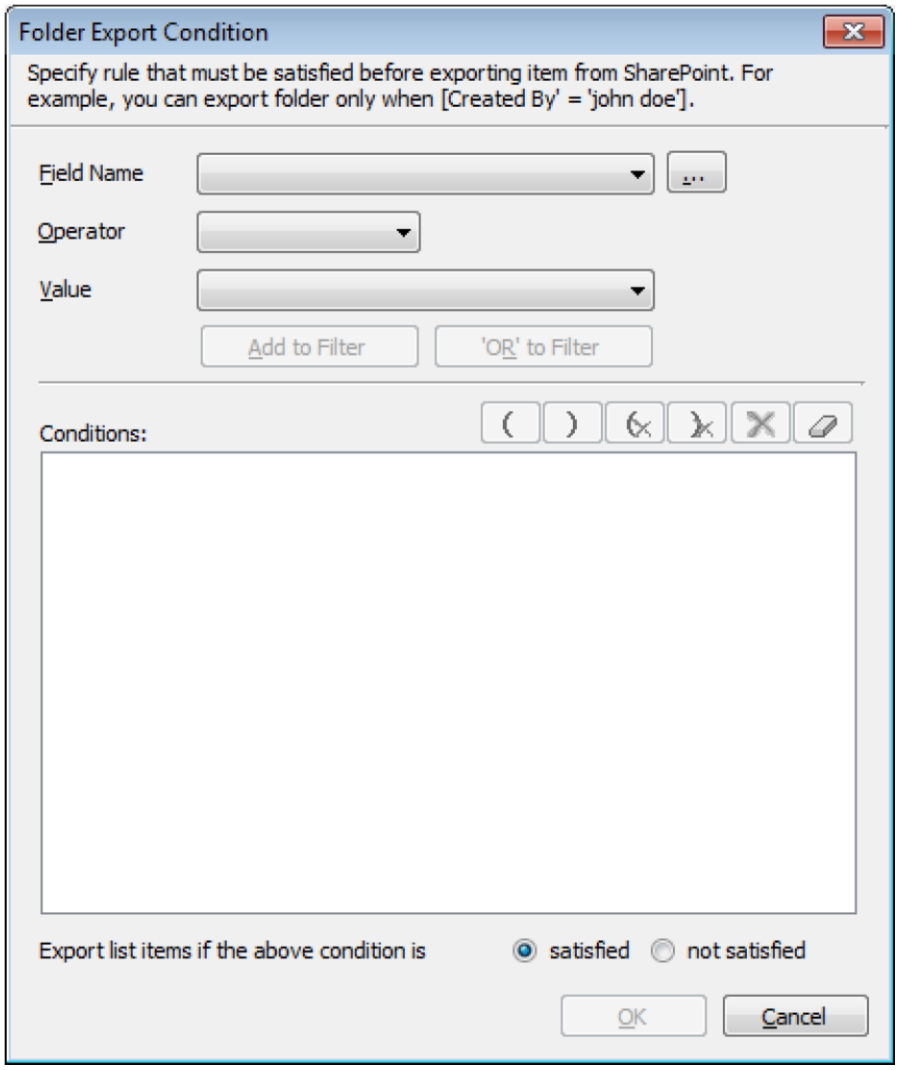
Export sites if the above conditions are satisfied - Sites that satisfy the condition will be marked for export.

Export sites if the above conditions are not satisfied - Sites that do not satisfy the condition will be marked for export.

b. List Level Filters

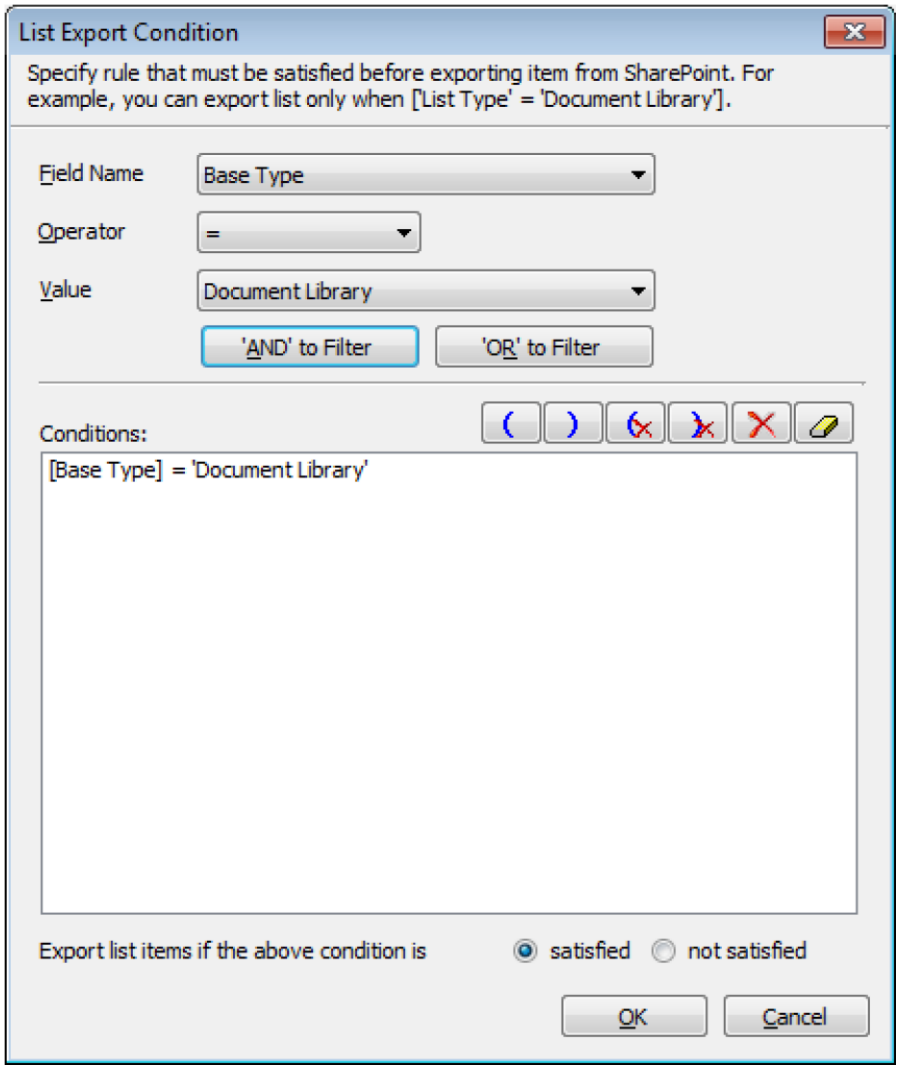
Click **List level filter** to specify the filter conditions.

The **List Level Filter** dialog appears as below:



c. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



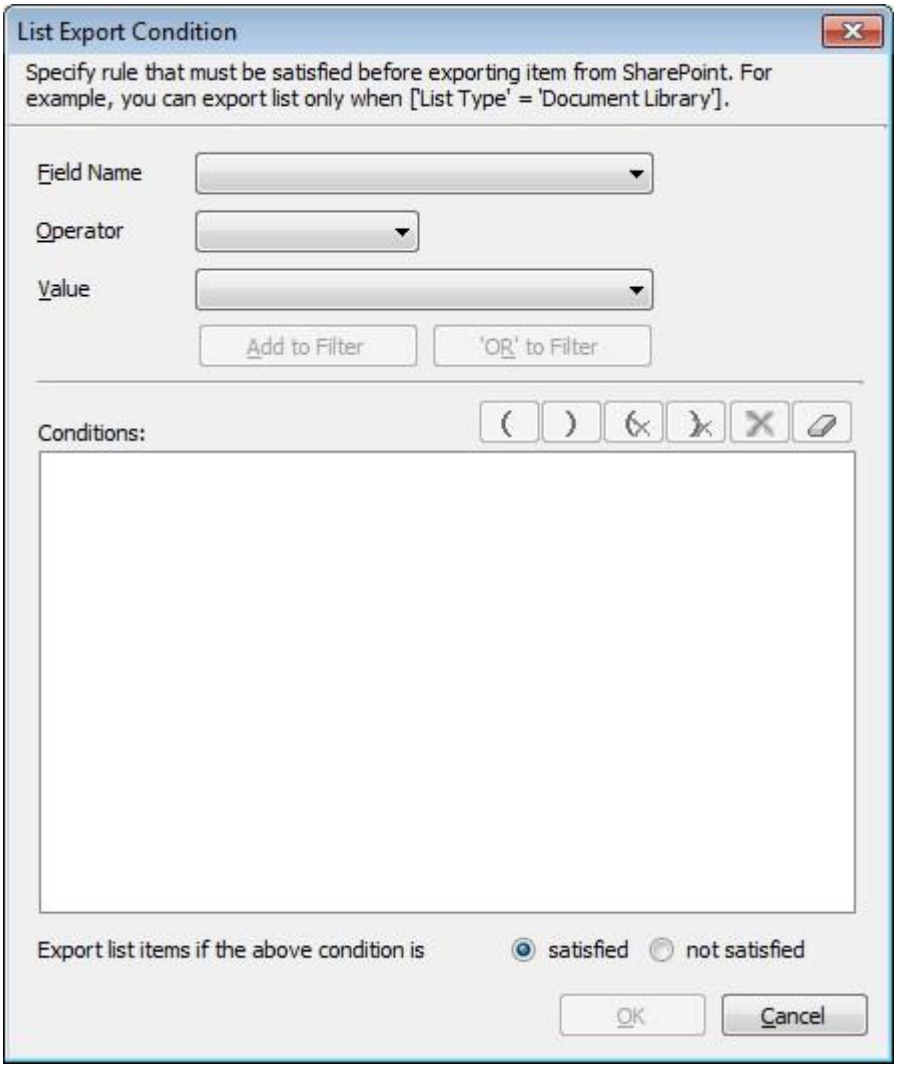
d. SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- Export list items if the above conditions are satisfied - Lists that satisfy the condition will be marked for export.
- Export list items if the above conditions are not satisfied - Lists that do not satisfy the condition will be marked for export.

e. Folder Level Conditions

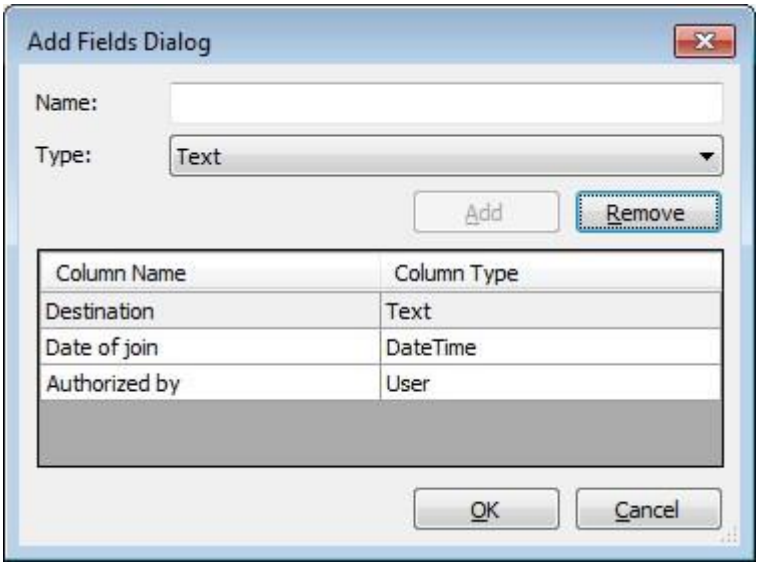
Click Folder level filter to specify the conditions

The **Folder Export Conditions Dialog** appears as shown below:



f. Click (...) button to add the SharePoint columns in Field Name dropdown.

The Add Fields Dialog appears as shown below:



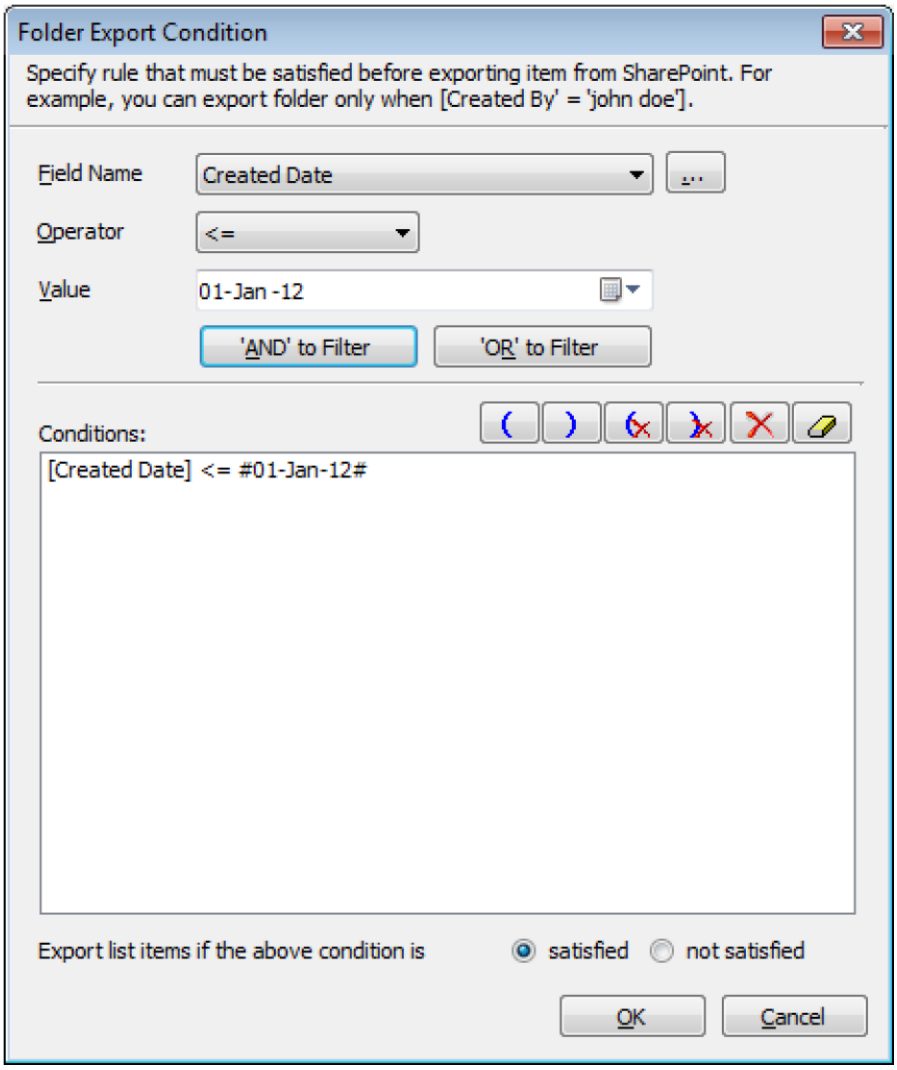
Specify the column name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Click Add button to add the columns to the fieldname dropdown list.

Click Remove button to remove the columns from the fieldname dropdown list.

g. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



h. SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- Export list items if the above conditions are satisfied - Folders that satisfy the condition will be marked for export.

- Export list items if the above conditions are not satisfied - Folders that do not satisfy the condition will be marked for export.

i. File or Item Level Filters Same as Folder Level Filters

3) Click Next to proceed.

Examples of Export Conditions

SPListX exports folders & files / attachments along with metadata to the file system location based on export conditions defined in the export task. Export conditions can be constructed using metadata columns and its values.

A few examples of list conditions are as follows:

Export Condition	Description
[Server Relative URL] = '/site name/subsite name/lists/list name'	Exports list items that have server relative URL as '/site name/subsite name/lists/list name' For example: [Server Relative URL] = '/vyapin/sharepoint/lists/Product List'
[List Name] = 'Cities'	Exports list item and attachments of lists named as 'Cities'
[List Type] = 'Document Library'	Exports documents from all document libraries in the entire web application.
[Base Type] <> 'Document Library'	Exports list items and attachments of all custom lists (other than document libraries) that are present in the entire web application.

A few examples of item and folder conditions are as follows:

Export Condition	Description
[Modified Date] > '09/09/2010'	Assuming the date specified by the user is in MM/DD/YYYY format and with this condition, SPListX exports list items that have been modified after 9th September 2009.
[Created By] = 'John Doe'	Exports list items that have been created by 'John Doe'
[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#	Assuming the date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.

[Content Type] = 'Document'	Exports list items that have content type as 'Document'
[Modified By] = 'John Doe'	Exports list items that have been modified by 'John Doe'

The following section describes the data types supported by SharePoint and an example of how to state the export condition.

SharePoint Data Type	Example	Description
Yes/No	[Document Verified] = 'Yes'	SPListX exports list items that have the 'Document Verified' value set to 'Yes'.
Text	[Title] <> 'Research'	SPListX exports only list items that do not have 'Research' as value for 'Title' field.
Date and Time	[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#	Assuming date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.
Number	[Product ID] > 10 OR [Product ID] <=100	SPListX exports list items that have 'Product ID' value lies in between 10 to 100.
Currency	[Product Cost] = 100	SPListX exports list items that have 'Product Cost' value equal to 100.
Choice	[City] = 'New York' [City] = 'London;Paris;Singapore'	Text or Number values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'City' column value set as 'London', 'Paris' and 'Singapore'.
Lookup	[Product Code] = 100	The values can be single or multiple. Multiple values should

	[Product Code] = 123ABC;154XYZ	be separated by ';'. SPListX exports the list items that have '123ABC' and '154XYZ' as value for 'Product Code' field.
People or Group	[Document Reviewed by] ='John Doe' [Document Reviewed by] ='John Doe; Jane Doe'	User or group values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'Document Reviewed by' value set to 'John Doe' and 'Jane Doe'.

Incremental Export in SPListX

Apart from relational operators, SPListX allows you to construct flexible export conditions by using the Changed operator for periodic import for the fields 'Created Date (SharePoint)' and 'Modified Date (SharePoint)'. The following built-in values can be used for this operator:

Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Update in SharePoint, Since Last Export in SPListX, Last 7 days and Last 14 days.

By using **Changed** operator, you can filter the list items based on the above mentioned values from SharePoint list.

For example, if you need to migrate list items that are modified in SharePoint today, you can specify an export condition as stated below:

[Modified Date] Changed [Today]

Operator & Value	Description	An Example	Result/Remarks
Changed Today	Exports list items that are created or modified in the present day (at the time of export) in SharePoint.	[Modified Date] Changed [Today]	SPListX compares the source list item's modified date value with the current day (at the time of export) and exports the list items which are modified on the current day.

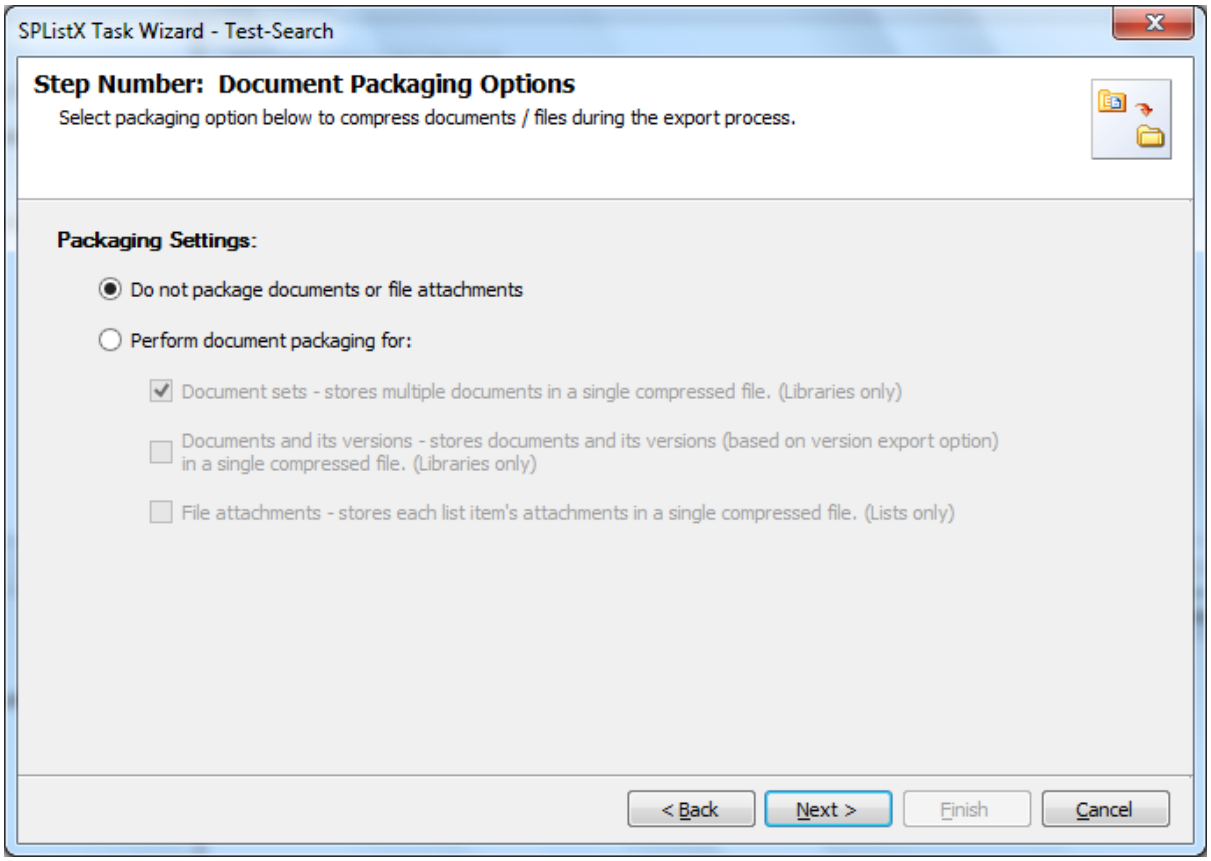
Changed Yesterday	Exports list items that are created or modified yesterday (at the time of export) in SharePoint.	Created Date] Changed [Yesterday]	SPListX compares the source list item created date value with yesterday (day before at the time of export) and migrates the matching list items.
Changed This Week	Exports list items that are created or modified in the current week.	[Modified Date] Changed [This Week]	SPListX checks the source list item's modified date value and exports the items that are changed in the current week.
Changed This Month	Exports list items that are created or modified in the current month.	[Modified Date] Changed [This Month]	SPListX checks the source list item's modified date value and exports the items that are changed in the current month.
Changed Last Week	Exports list items that are created or modified in the last week.	[Created Date] Changed [Last Week]	SPListX checks the source list item's created date value and exports those items that are changed in last (previous) week.
Changed Last Month	Exports the list items that are created or	[Modified Date] Changed [Last Month]	SPListX checks the source list item's modified

	modified in the last month.		date value and exports those items that are changed in last (previous) month.
Changed Since Last Export using SPListX	Exports list items that are modified in the source folder, since the last export using SPListX. It is based on the last 'Import date and time' value internally maintained for the list item in SPListX.	[Modified Date] Changed [Since Last Export using SPListX]	SPListX compares the source list item's modified date value with list item's last import date and time maintained by the application and proceeds with the export accordingly.
Changed Last 7 days	Exports list items that are created or modified in the last days] 7 days.	[Modified Date] Changed [Last 7	SPListX checks the source list item's modified date value and exports the items that are changed in the last 7 days.
Changed Last 14 days	Exports list items that are created or modified in the last days] 14 days.	[Modified Date] Changed [Last 14	SPListX checks the source list item's modified date value and exports the items that are changed in the last 14 days.

3.1.8 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets, document / file versions and file attachments as packaged contents grouped together. Follow the steps outlined below to store multiple document versions, document sets and file attachments grouped together in the file system / file share.

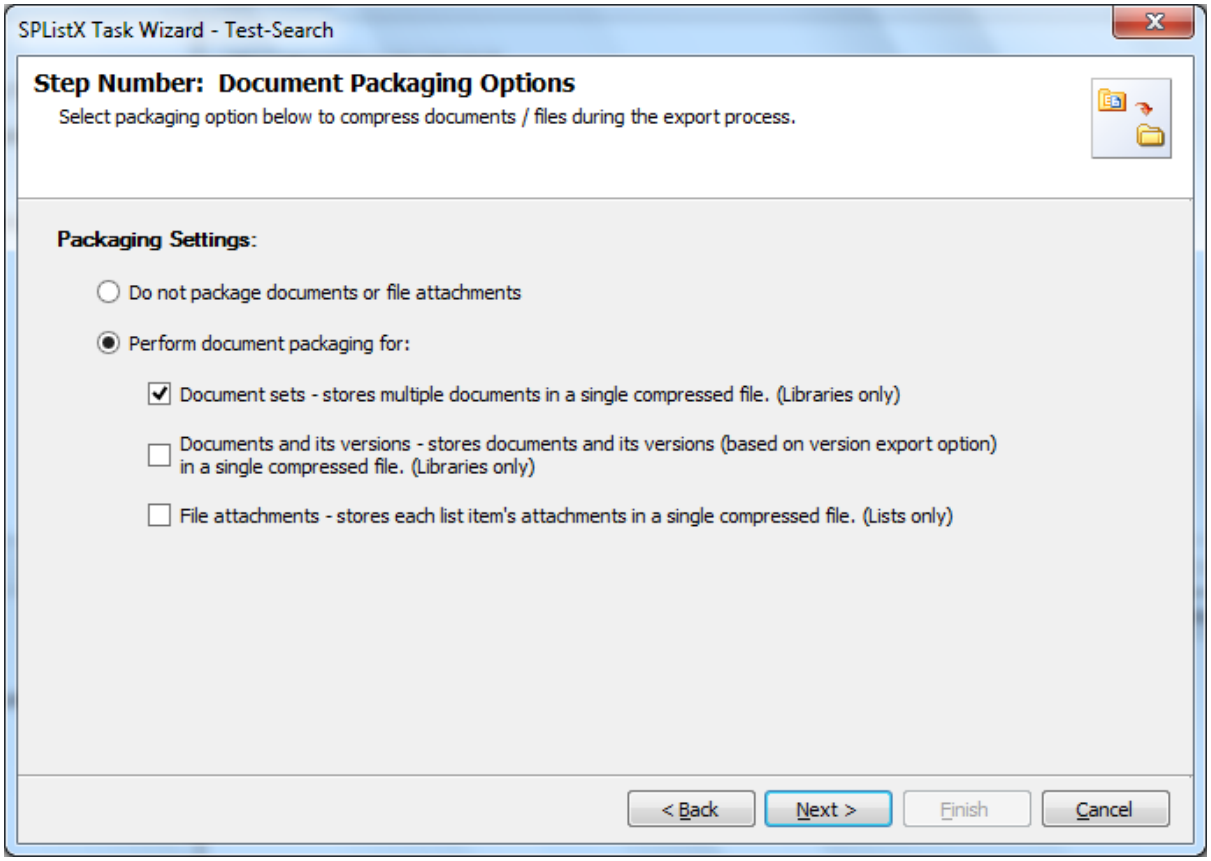
1) The **Document Packaging** Options step appears as shown below:


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

2) Select **Packaging Settings** from the options outlined below:

a. Do not package documents or file attachments: SPListX will not package the exported documents or file attachments.

b. Perform document packaging for: Document package will be created for each exported document set, file version and file attachment based on the option selected below. If the file already exists in the package, File Settings options will be applied.


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

i. **Document sets -** This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.

ii. **Documents and its versions -** This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in Versions Settings wizard step.

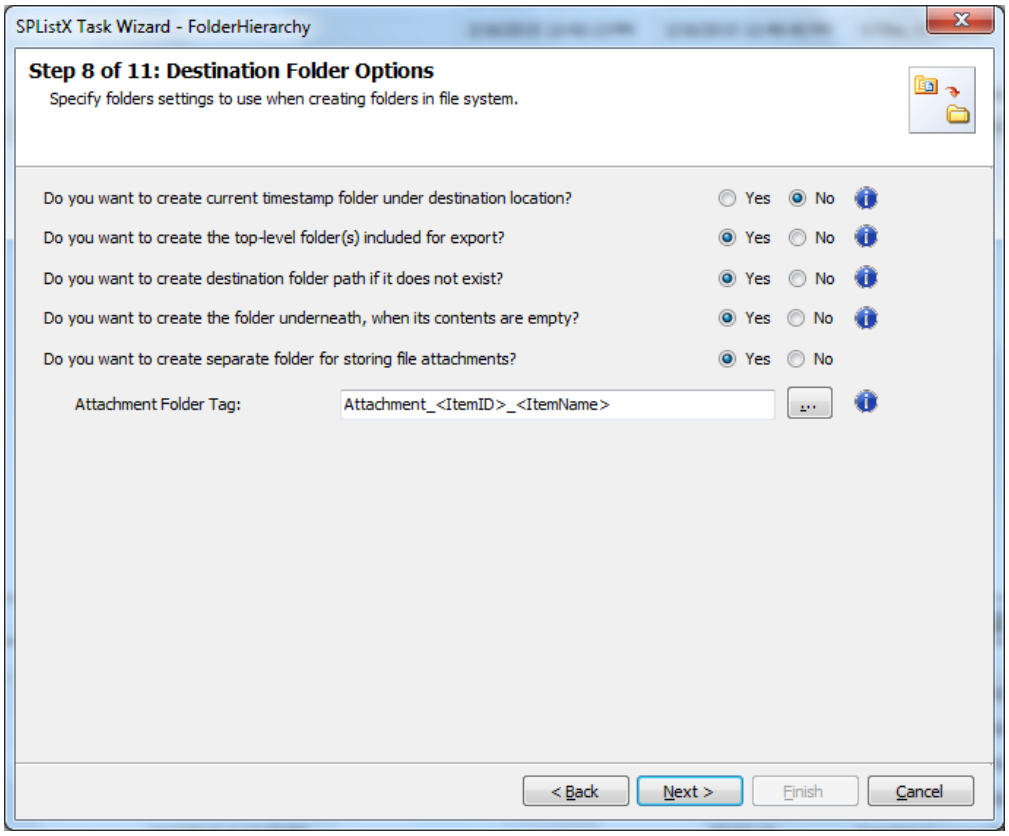
iii. **File Attachments** - This option will package each list item's attachment(s) into a single compressed file. The compressed package is created in the name of listitem ID.

3) Click **Next** to Proceed.

3.1.9 Destination Folder Options

SPListX will create destination folders based on the following options given below.

1) The **Destination Folder options** specification wizard step appears as shown below:


SPListX Task Wizard - FolderHierarchy
Step 8 of 11: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
...
< Back
Next >
Finish
Cancel

2) Select from the following options:

a) Do you want to create current timestamp folder under destination location? - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).

b) Do you want to create top-level folder(s) included for export? - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

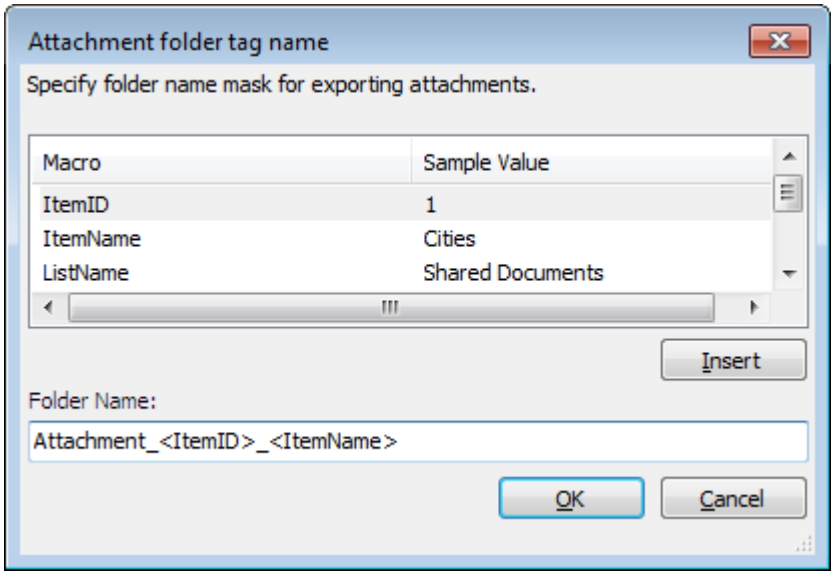
c) **Do you want to create destination folder path if it does not exist? -** This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) **Do you want to create the folder underneath, when its contents are empty? -** This option creates the folder in the destination location, if the source folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

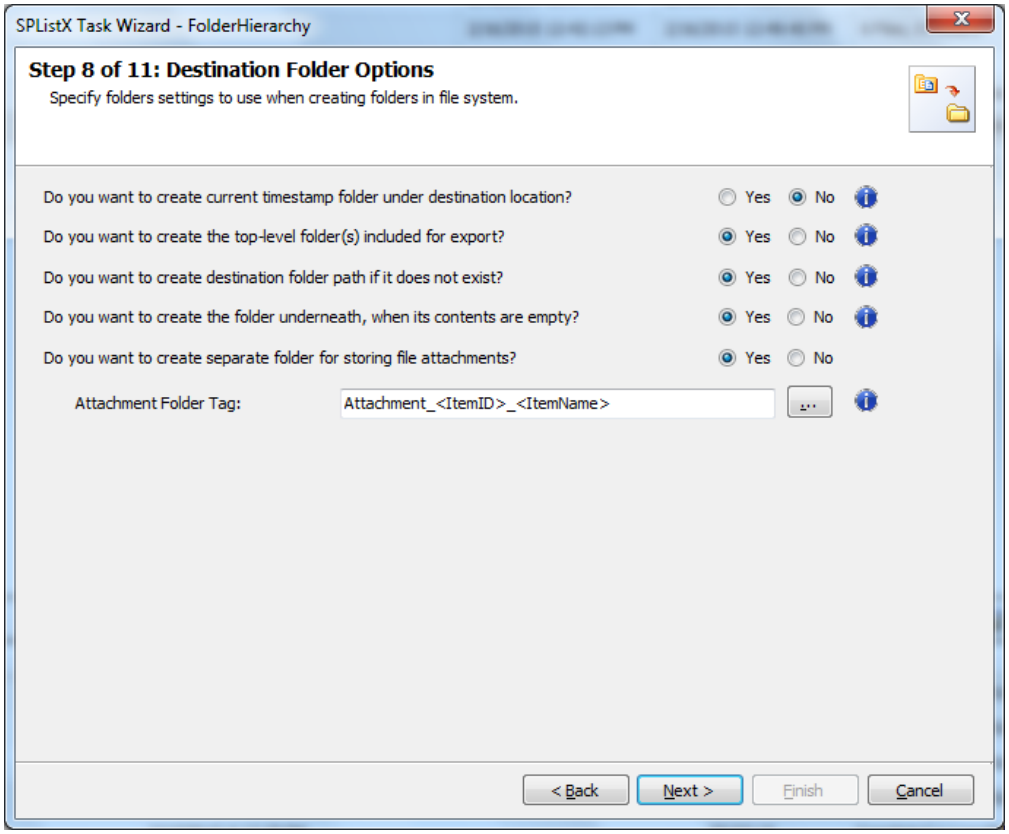
e) **Do you want to create separate folder for storing file attachments? -** This option creates separate folder for storing file attachments under the specified destination location by selecting the option (yes/No).

You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.


SPListX Task Wizard - FolderHierarchy
Step 8 of 11: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
...
< Back
Next >
Finish
Cancel

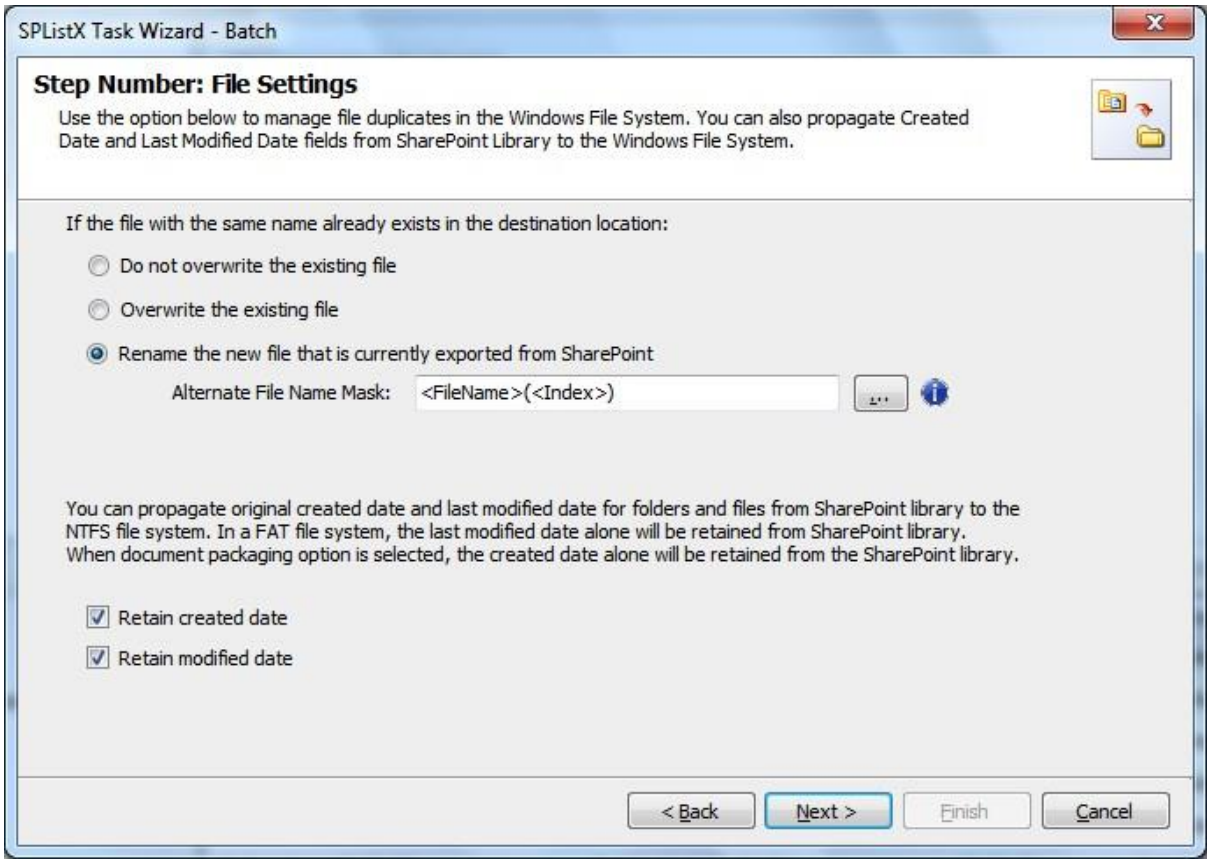
3) Click **Next** to proceed.

3.1.10 File Settings

To construct **Alternate File Mask** and to propagate created Date and Modified Date from SharePoint Library to Windows File System, use below options:

1) Alternate File Name Mask

If the file with the same name already exists in the destination location, follow the steps outlined below:


SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

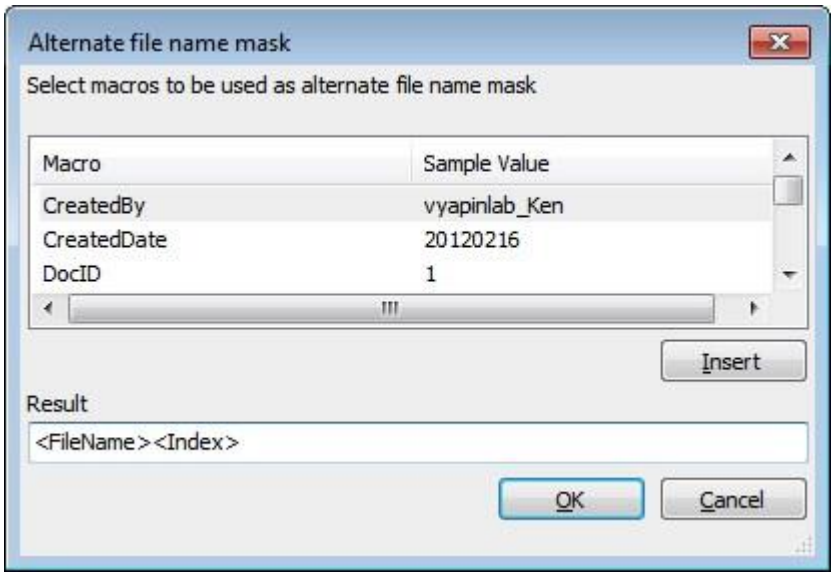
a) **Do not overwrite the existing file -** Skips the file without overwriting the existing file with the same name.

b) **Overwrite the existing file -** Deletes the file from the destination location and exports the current source file.

c) **Rename the new file that is currently exported from SharePoint -** Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

To select alternate file naming mask, click the alternate file name mask button placed next to the alternate file name mask textbox.

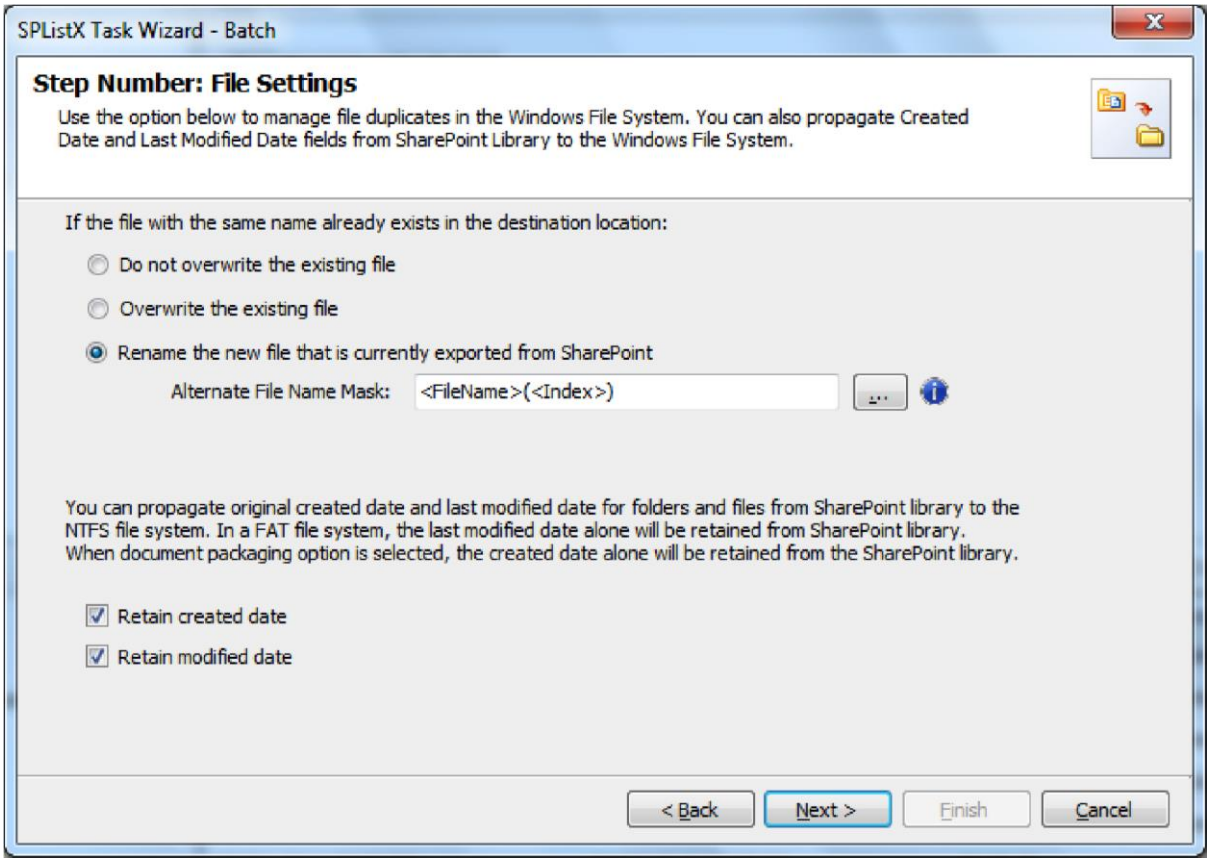
Alternate file name mask dialog appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. *Click* **OK** to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:


SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

a) **Retain created date -** Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.

b) **Retain modified date -** Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

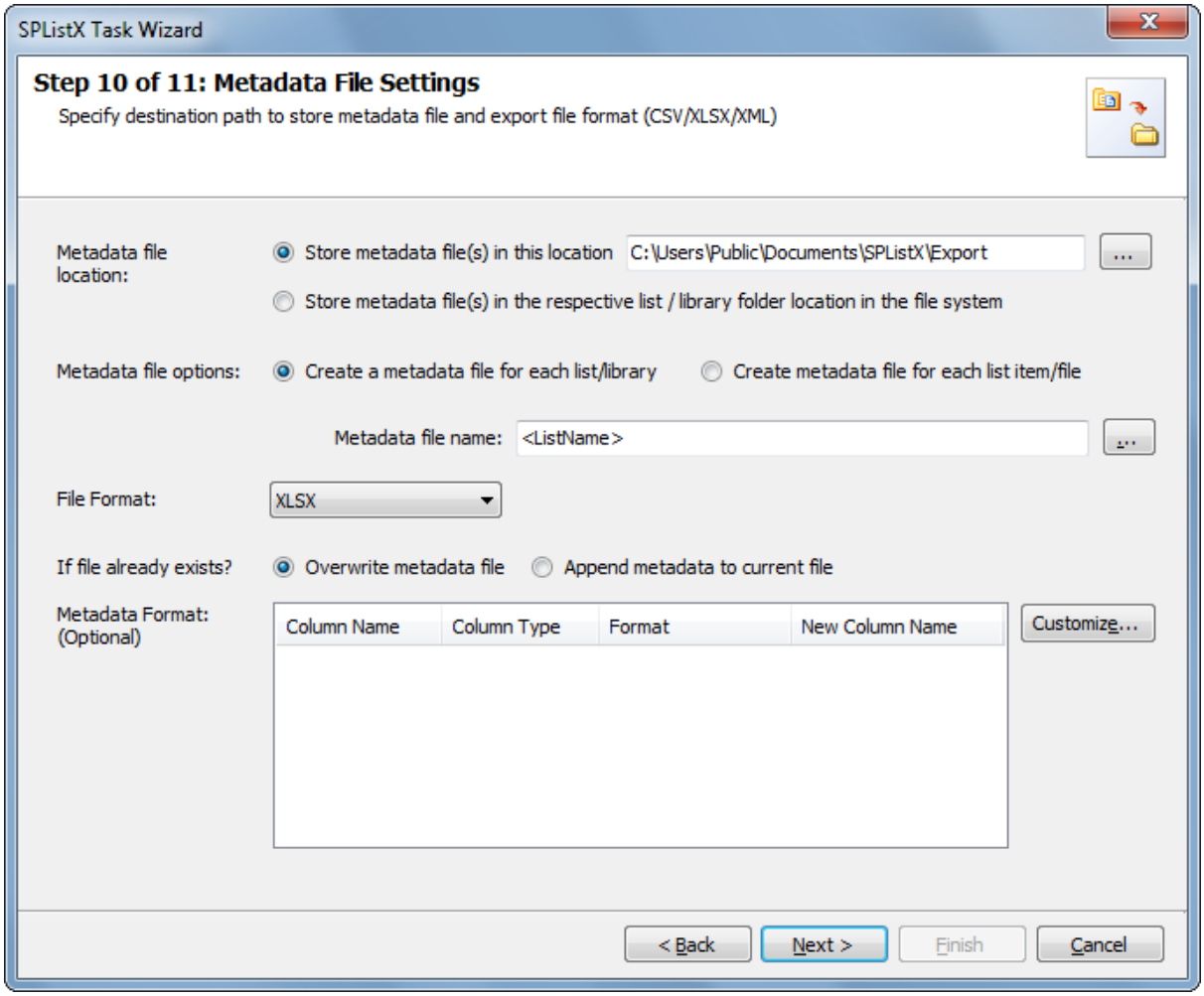
NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

3) Click **Next** to Proceed.

3.1.11 Metadata File Settings

SPListX will create metadata files based on the following options given below:

1) The **Metadata File Settings** step appears as shown below:


SPListX Task Wizard
Step 10 of 11: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)
Metadata file location:
Store metadata file(s) in this location
C:\Users\Public\Documents\SPListX\Export
Store metadata file(s) in the respective list / library folder location in the file system
Metadata file options:
Create a metadata file for each list/library
Create metadata file for each list item/file
Metadata file name:
<ListName>
File Format:
XLSX
If file already exists?
Overwrite metadata file
Append metadata to current file
Metadata Format: (Optional)
Column Name
Column Type
Format
New Column Name
Customize...
< Back
Next >
Finish
Cancel

2) Specify the **Metadata filename & location** using the options below:

a) Store metadata file(s) in this location: Specify a folder path where the selected list items metadata are to be exported. You can also click **browse ('...')** button to launch folder browser dialog.

b) Store metadata file(s) in the respective list / library folder location in the file system: - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

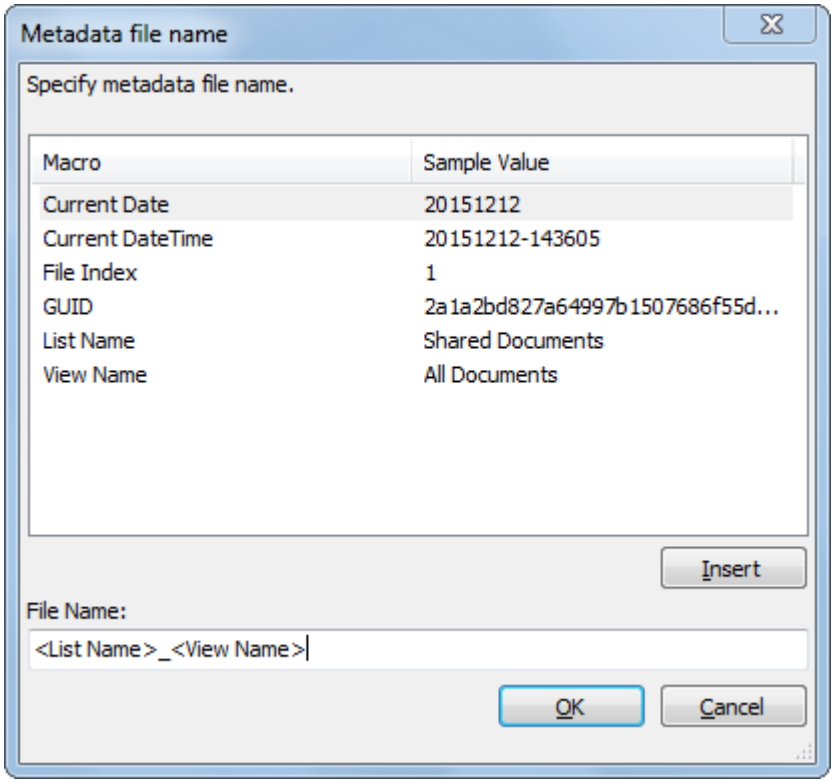
NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

3) Specify the Metadata file options using the options below:

a) **Create a metadata file for each list/library:** This option will export the metadata for the entire list/library in a single file.
b) **Create metadata file for each list item/file:** This option will export separate metadata file for each list item or file.

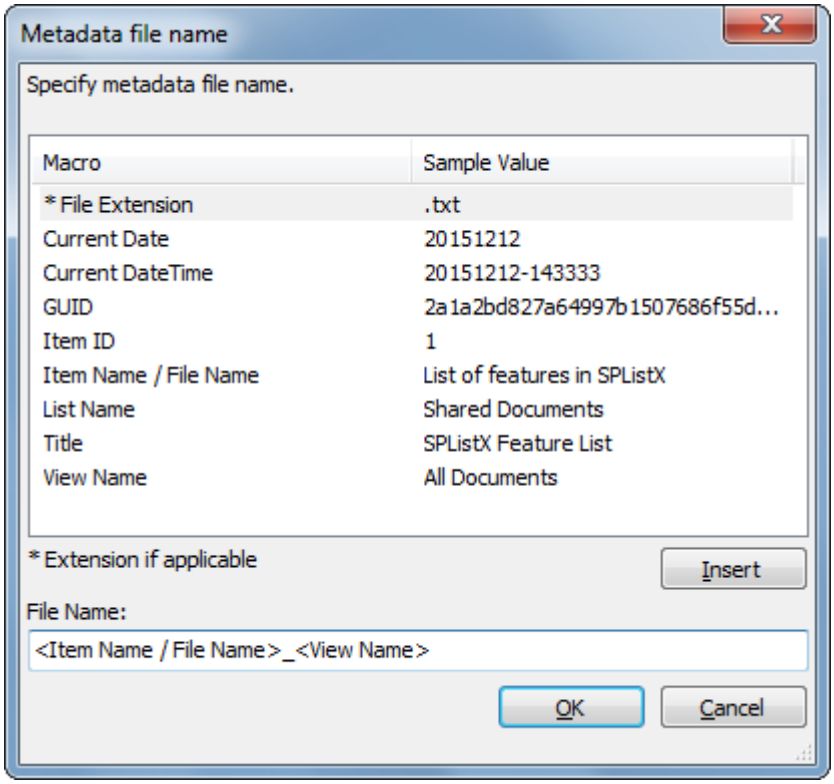
4) When you select **Create a metadata file for each list/library option**, SPListX creates the metadata file using the List name.

To create a unique metadata file name, click the (...) button placed next to the metadata file name textbox. Metadata file name dialog appears as shown below:



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

5) When you select **Create metadata file for each list item/file option**, SPListX creates the metadata file using the Item name.



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

*** Note: ViewName** macro is applicable only for View based export. SPListX will substitute the name of the processed view wherever applicable.

In view based export,

For list / library entries and for files / folders within them, it appends the view name.

For file / folder entries provided for export, it appends "All Items" instead of the view name.

e.g., List of features in SPListX_All Items.xlsx

6) Specify the Metadata file format using the options below:

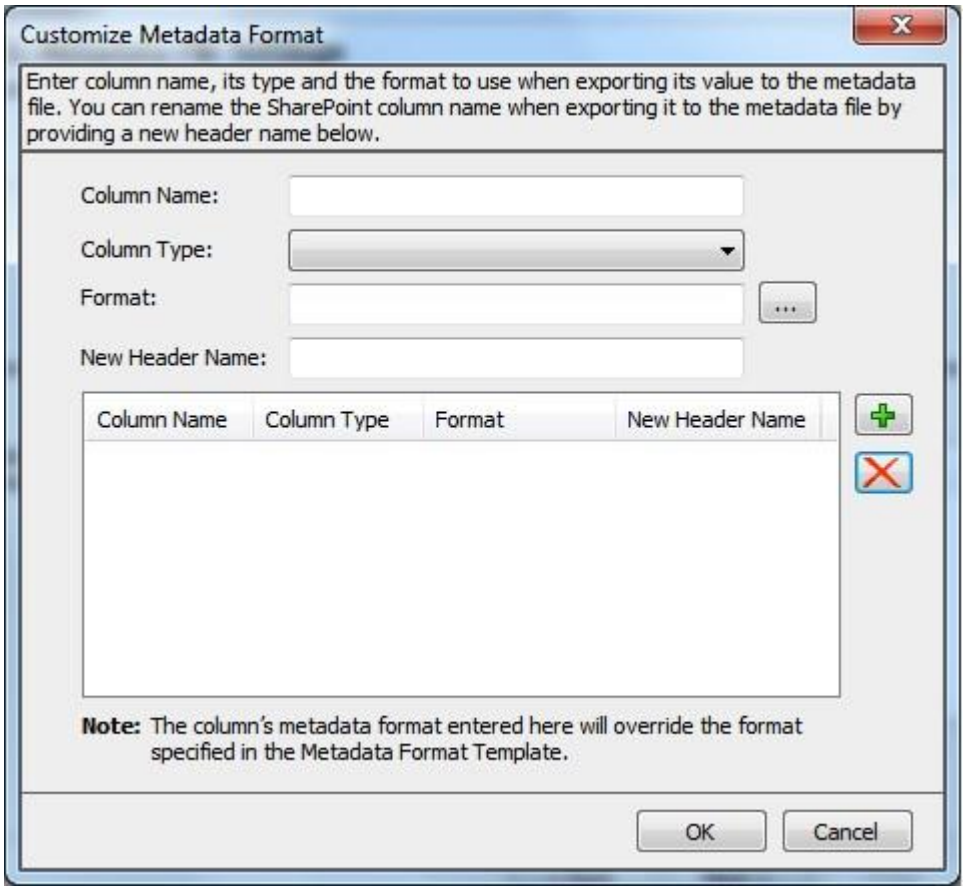
a. **CSV**
b. **XSLX**
c. **XML***
d. **XML with DTD***

7) If the metadata file already exists in the destination location, choose from any one of the following options:

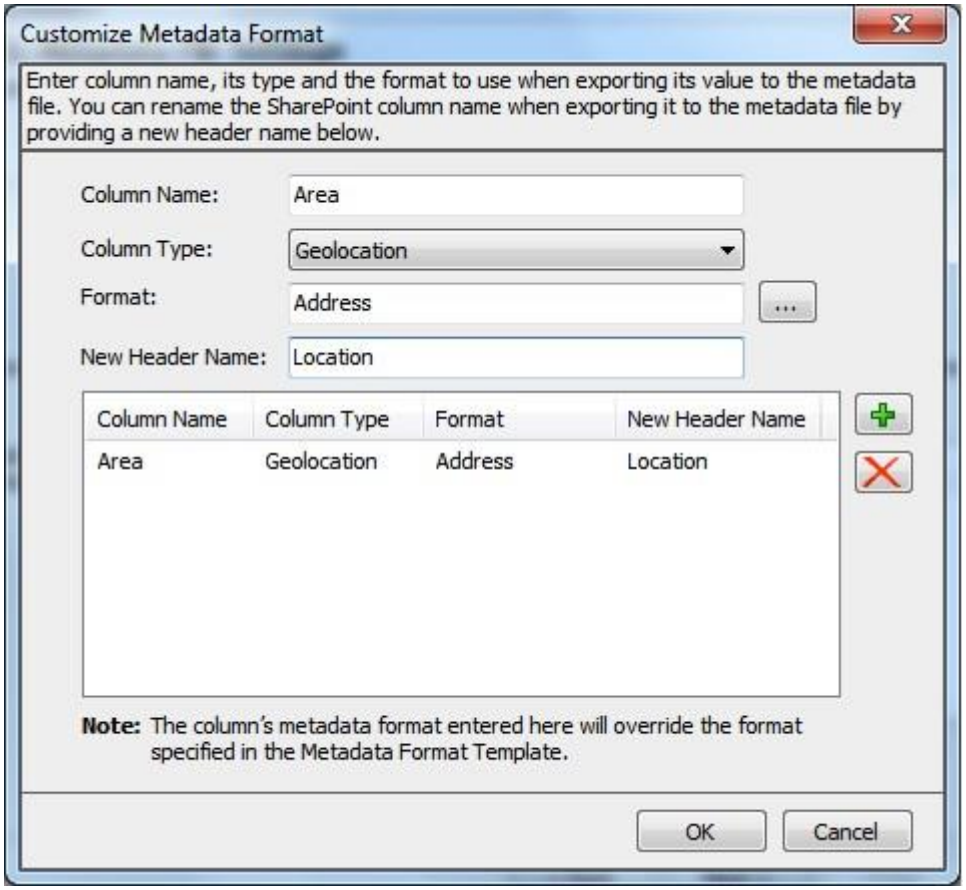
a) Overwrite: This option will overwrite the existing metadata file.
b) Append: This option will append the new metadata to the existing metadata file. The new metadata will be shown in the new sheet with the name of current timestamp in XLSX file.

8) You can specify a new metadata custom format based on the column name when generating the metadata file. The format specified here overrides the application

level template defined in **Metadata Format Template** tool. Also, you can specify new column names to use when generating the metadata file in the file system location. To use this feature, click the Edit button. A **Customize Metadata Format** Dialog appears as shown below:


Customize Metadata Format
Enter column name, its type and the format to use when exporting its value to the metadata file. You can rename the SharePoint column name when exporting it to the metadata file by providing a new header name below.
Column Name:
Column Type:
Format:
New Header Name:
Column Name
Column Type
Format
New Header Name
Note: The column's metadata format entered here will override the format specified in the Metadata Format Template.
OK
Cancel

9) Specify SharePoint column name in the **Column Name** textbox and select its type from the available **Column Type** from combo box. **Click** ... button to load the available macros. Select format from the available macros. If you want to rename the SharePoint column name when exporting to the metadata file, provide a new name in the **New Header Name** text box. For example, a SharePoint column named 'Area' in the source SharePoint list can be customized and renamed as 'Location' when creating the metadata file during the export operation.



Click to add the SharePoint column name and its format in the custom metadata format list.

Click to remove t he SharePoint column name from the custom metadata format list.

10) Click ***Next*** to Proceed.

*** Note:**

XML File Format:

SPListX generates an XML file using the filename (using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name) in the stated metadata file location with the metadata information.

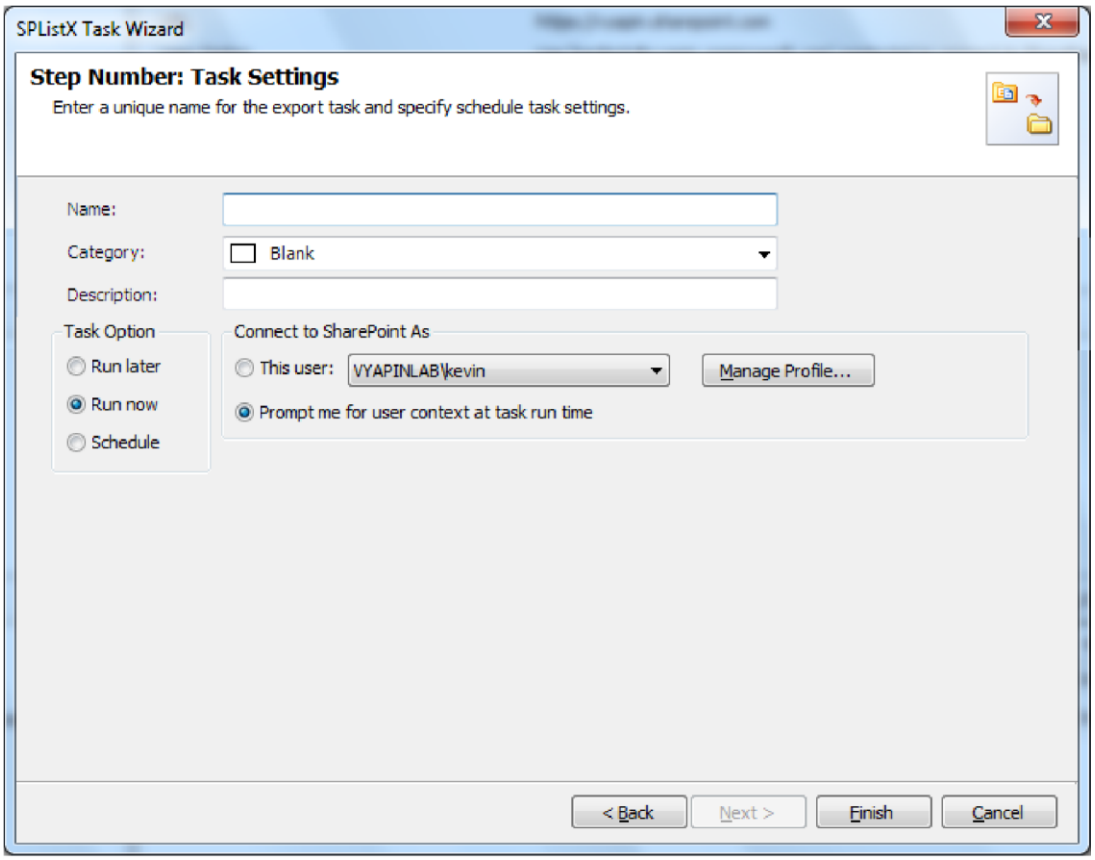
XML with DTD

SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput. XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

3.1.12 Task Settings

To specify the task name, category and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) The **Task Settings** step appears as shown below:



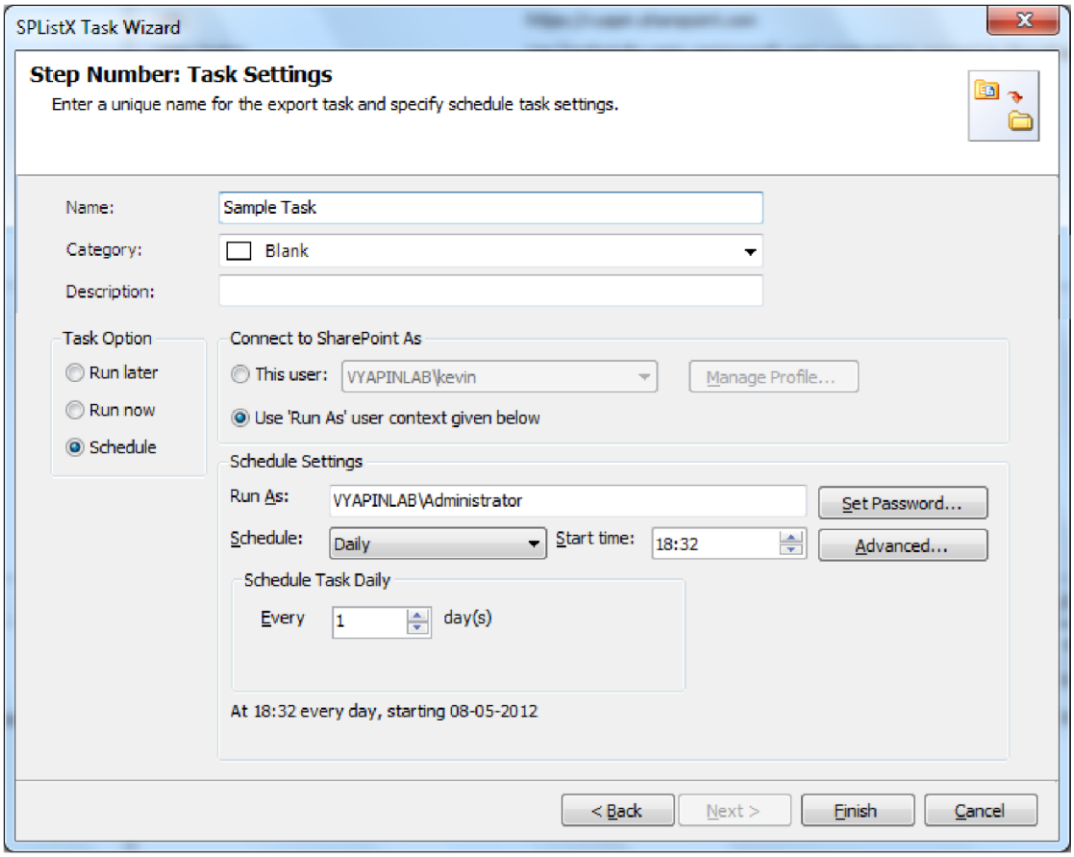
2) Enter a unique task name in **Task Name** textbox.

3) Select a **Category** from the Drop-Down List in which the task should be categorized & stored.

4) Enter a **Description** for the export task.

5) Select a **Task Option** from one of the following options:

- **a) Run later -** to run the task later as and when desired
- **b) Run now -** to run the task immediately after *clicking Finish* button
- **c) Schedule -**to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the Run As user account specified in this export wizard step. The Run As account should be a valid Windows domain account.



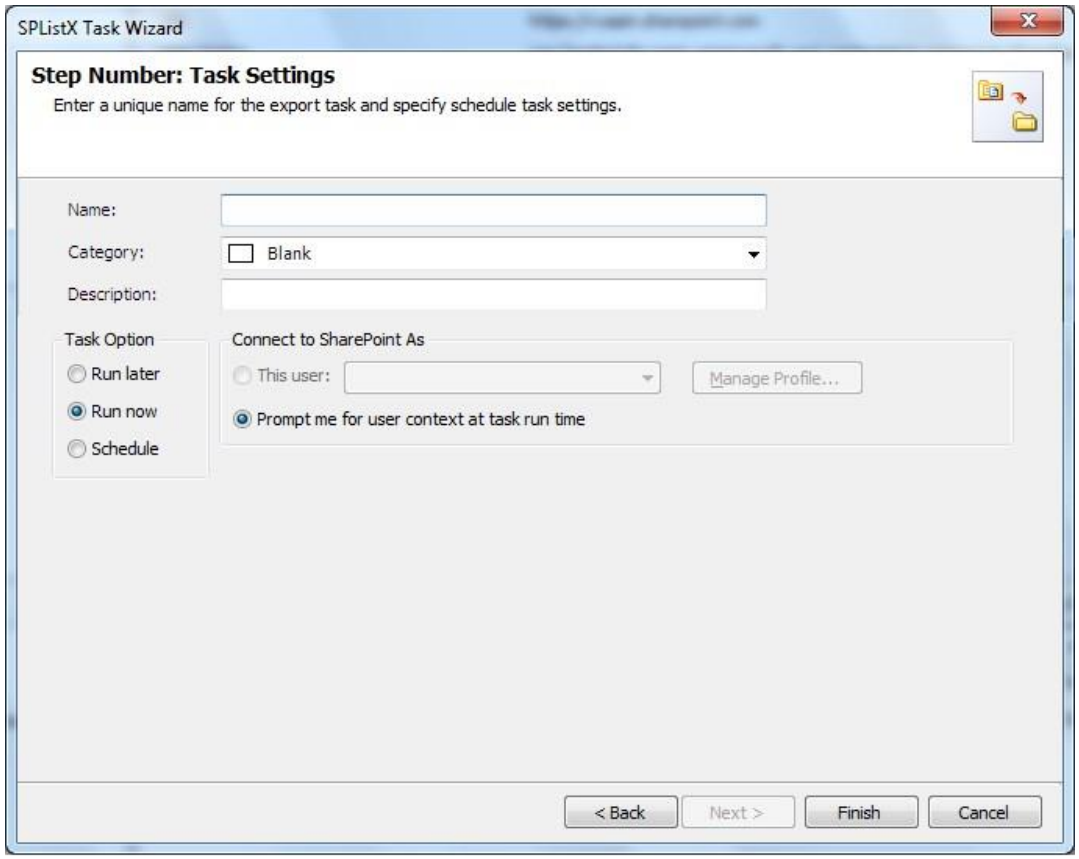
In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager Applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

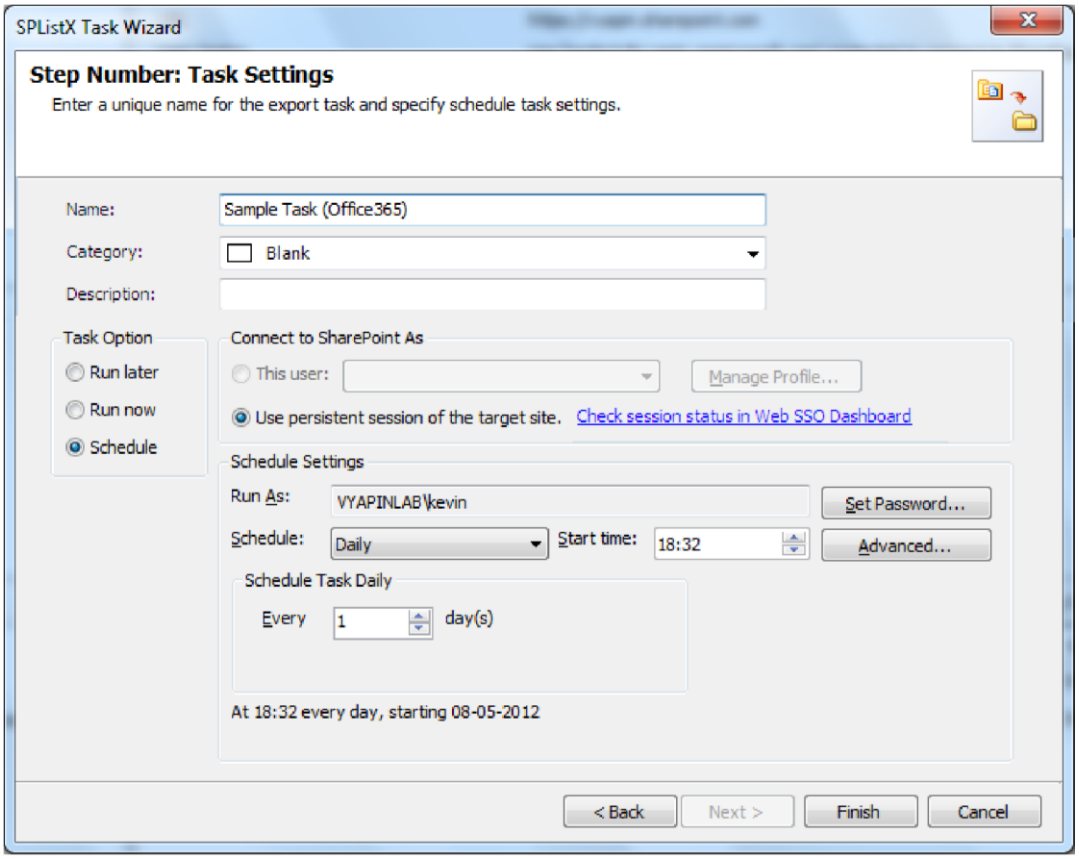
Click **Manage Profile** button to create new user profile.

6) As for **Web Single Sign-on** credential based export task, the task settings will be shown as below:

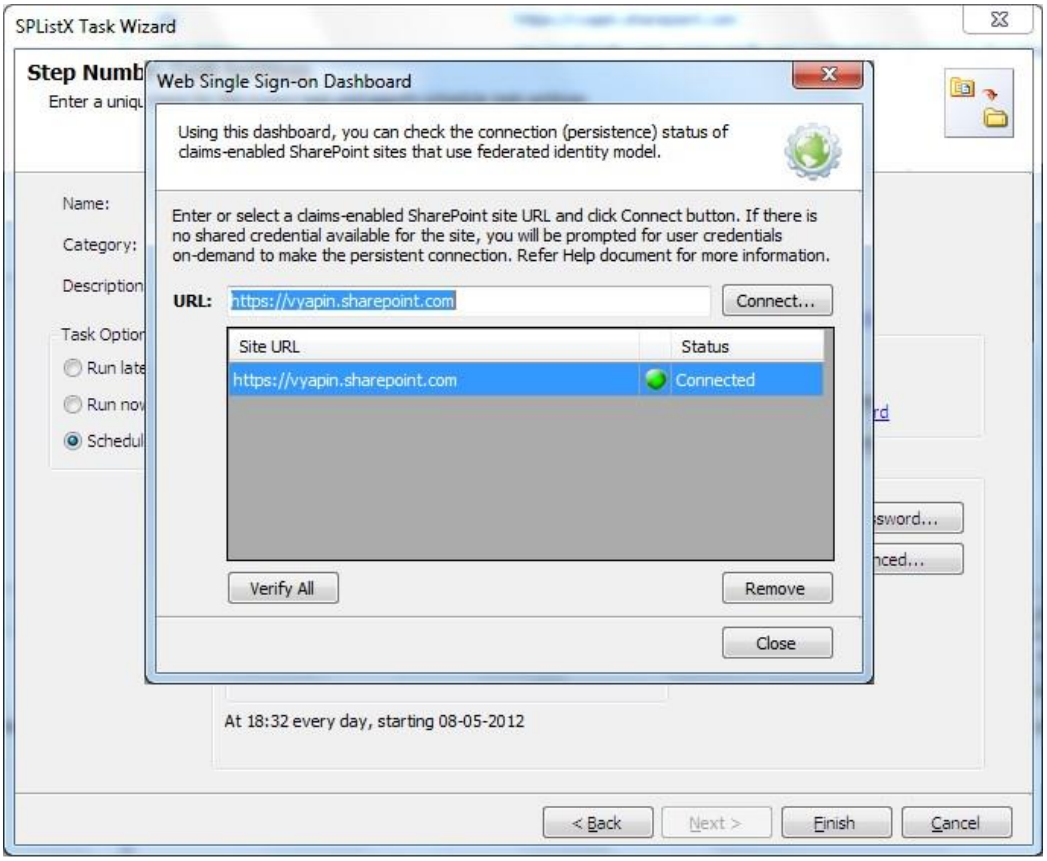


The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

7) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:



8) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, click **Check session status in Web SSO Dashboard** hyperlink.



7) Click **Finish** button to create the task.

4 Export SharePoint List contents using a batch descriptor file

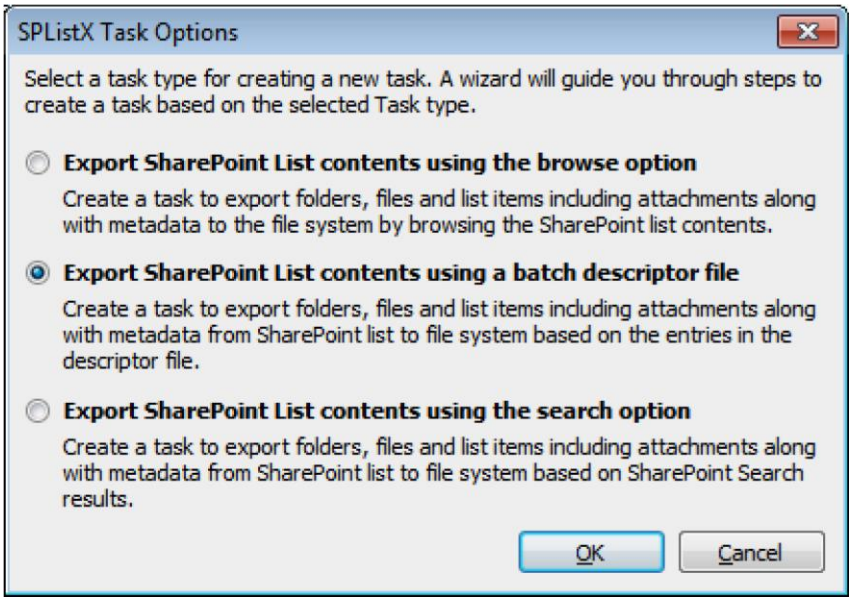
Create task

- Create Batch Descriptor File
- Export Option
- Batch Descriptor File
- List View Options
- Version Options
- Permission Options
- Export Condition
- Document Packaging Options
- Destination Folder Options
- File Settings
- Metadata File Settings
- Task Settings

4.1 Create Task

Create a task to export folders / files along with their list metadata from SharePoint Library to file system or network share based on the entries in the descriptor file. SPListX will process the files in the order in which they appear in the batch descriptor file.

1) **Select Export files and metadata using a batch descriptor file option in SPListX Task Options dialog as shown below and click OK.**


SPListX Task Options
Select a task type for creating a new task. A wizard will guide you through steps to create a task based on the selected Task type.
Export SharePoint List contents using the browse option
Create a task to export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
Export SharePoint List contents using a batch descriptor file
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
Export SharePoint List contents using the search option
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint Search results.
OK
Cancel

2) **The SPListX Task Wizard appears**

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

3) Click **Next** button
4) Specify **Batch Descriptor File**
5) Specify **List View Options**
6) Specify **Version Options**
7) Specify **Permission Options**
8) Specify **Export Conditions**
9) Specify **Document Packaging Options**
10) Specify **Destination Folder Option**
11) Specify **File Settings**
12) Specify **Metadata File Settings**
13) Specify **Task Settings**
14) Click **Finish** button to create the Task, or click **Back** button to change any task settings.

4.1.1 Create Batch Descriptor File

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using a batch descriptor file** task type.

1) The first row of the metadata file should contain the Field Names as headers.

2) The first field should be named as **'Path'** and second field should be named as **'Destination Path'.**

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key: (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (Comma)	CSV Delimited
; (Semi-colon)	Delimited (;)
*(asterisk)	Delimited (*)

3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., http://vyapin/Shared Documents) or sub-folder URL within SharePoint List (e.g., http://vyapin/Shared Documents/sample folder1) or file URL within the SharePoint List (e.g., http://vyapin/shared documents/sample folder1/SampleDocument.doc) or list item URL within the SharePoint List (e.g., http://vyapin/lists/cities/1_.000)

4) Use wildcard representations (*, and *.*) in order to export the list items from the source SharePoint list. Please see wildcard characters usage for this purpose:

Wildcard characters	Example	Description
.*	http://sharepoint/lists/Cities/.*	Exports all items from the source SharePoint list.
.(default)	http://sharepoint/shared documents/*.*	Exports all items and folders from the source SharePoint list.
.	http://sharepoint/lists/tasks/.	Exports list items available in the top level folders only.
***	http://sharepoint/lists/custom list/*	Exports folder structure only.

NOTE: For list items folder traversal option is not applicable.

5) Use wildcard representations (*, . and *.*) in order to export the list from the source SharePoint. Please see wildcard characters usage for this purpose:

Wildcard characters	Example	Description
.*	http://sharepoint/.*	Exports lists from all the subsites.
.(default)	http://sharepoint/*.*	Exports lists from all the sites and sub-sites from the source SharePoint.
.	http://sharepoint/.	Exports lists from the top level site.

6) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.

7) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g.,\\Machine_ Name\Share_ Name).

8) For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (“”) e.g., “http://vyapin/Shared Documents/sample folder1”. When using accent characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

9) For Microsoft Excel file formats (XLSX), you do not have to enclose the field names and their corresponding values within double quotes.

Sample format of a CSV / TEXT batch descriptor file:

NOTE: Refer Point #2 for the separator to be used in the batch descriptor file

“**Path**”, “**Destination Path**“

“http://vyapin/shared documents/Sample Brochure.doc“, “C:\My Documents”

“http://vyapin/shared documents/sample folder1/*“, “\\vyapinfs\ExportDocs\shared doc contents”

“http://vyapin/lists/*.*“, “C:\My Sales\Lists Backup”

"http"//Vyapin/lists/cities/.*","C:\My Cities\Backup

4.1.2 Export Options

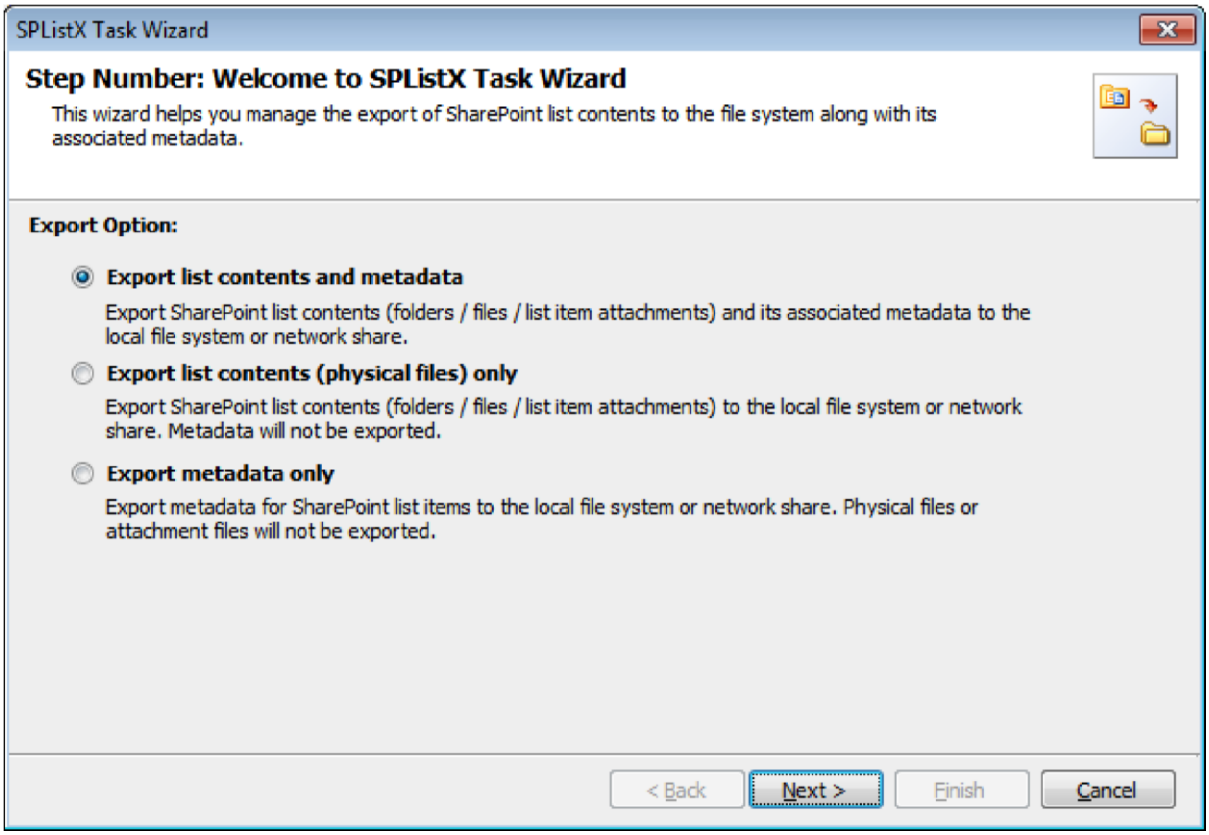
You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

A. **Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.

B. **Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.

C. **Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:

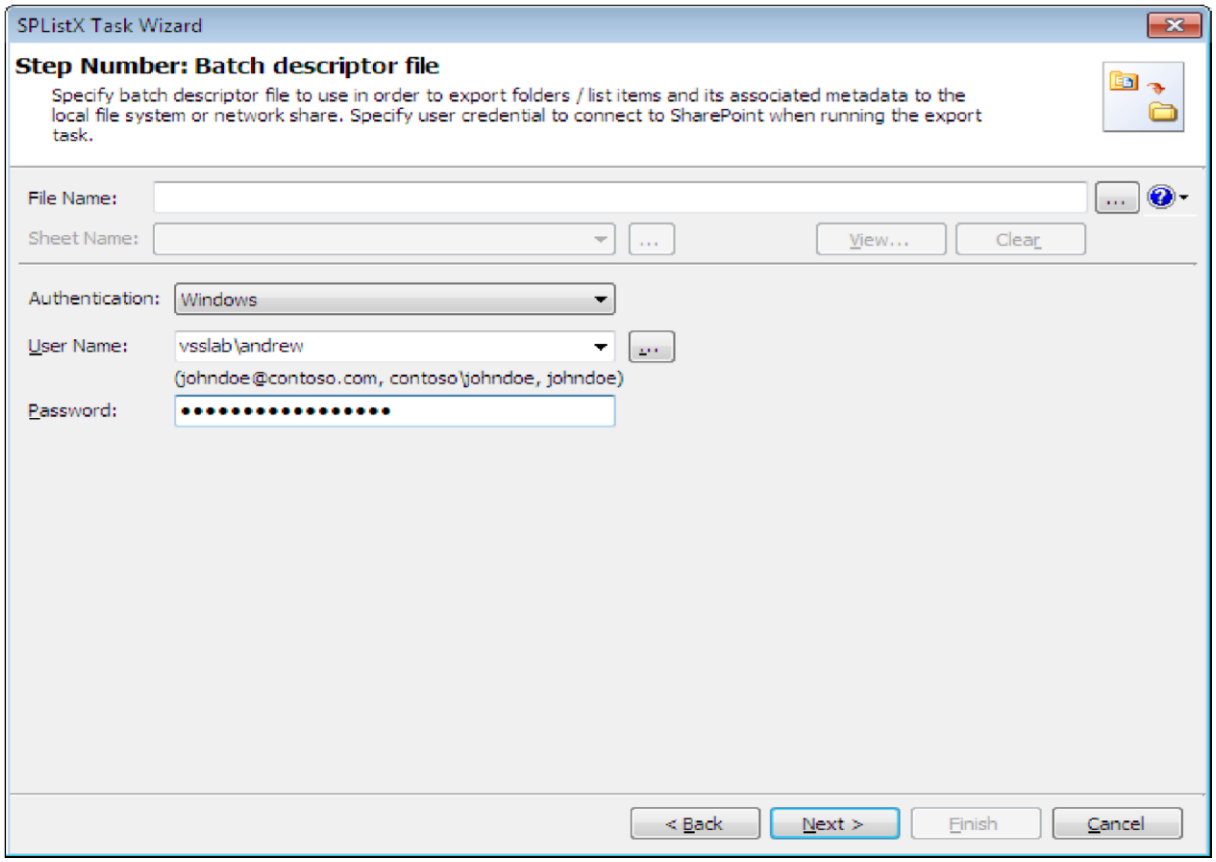

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

Select the required export options. The wizard guides you with the steps accordingly.

4.1.3 Batch Descriptor File

You can create a SPListX export task using a batch descriptor file that states the folders and list items to export from the SharePoint list along with the destination file system location to store the exported item. SPListX will export the folders, list items and associated metadata based on the sequential entries in the batch descriptor file.

1) The **Batch descriptor file** specification step appears as shown below:


SPListX Task Wizard
Step Number: Batch descriptor file
Specify batch descriptor file to use in order to export folders / list items and its associated metadata to the local file system or network share. Specify user credential to connect to SharePoint when running the export task.
File Name:
Sheet Name:
View...
Clear
Authentication:
Windows
User Name:
vsslab\andrew
(johndoe@contoso.com, contoso\johndoe, johndoe)
Password:
< Back
Next >
Finish
Cancel

2) **Click (...)** button to select the batch descriptor file. The descriptor file can be in any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).

3) **Click** to see a sample batch descriptor file (such as, Comma delimited (CSV), MS-Excel (XLSX)).

4) The batch descriptor file will automatically be extracted once the file name is specified. If you are using Microsoft Excel based file format, then select the sheet name to use from the drop-down.

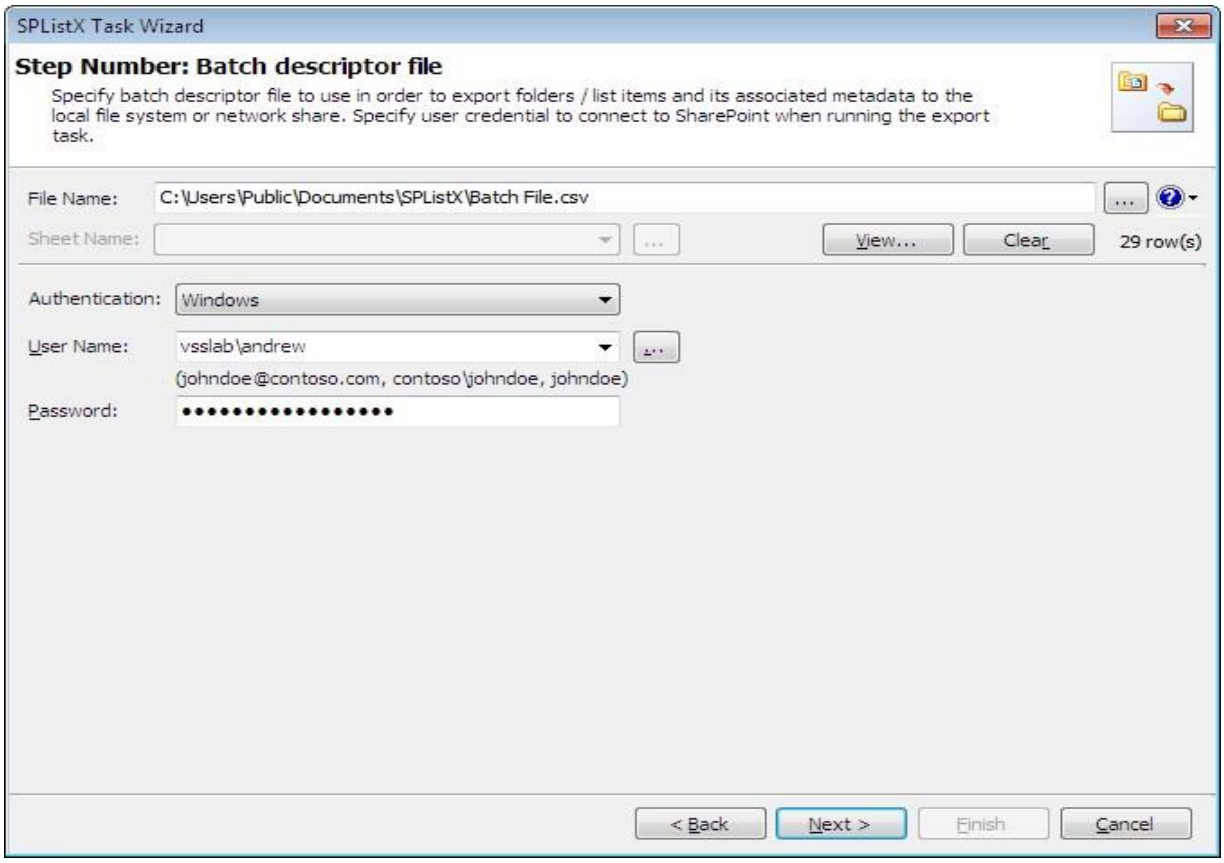
5) **Click (...)** to add a hidden sheet name from Excel file in drop down.

6) Specify the Authentication mechanism and credentials to connect to SharePoint using one of the options described below:

a) Windows or Forms - SPListX will initiate Windows or Forms authentication using the user account information stored in the user profile or the one entered in the textbox.

b) Office 365 Cloud Identity - Connects to a SharePoint Online site in Office 365 using the given cloud identity i.e., Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com.

c) Federated Identity - Connects to a SharePoint site (On-premise or SharePoint Online) using the federated identity account configured using ADFS. Select this option to connect to Office 365 SharePoint Online sites that are configured using federated identity provider.



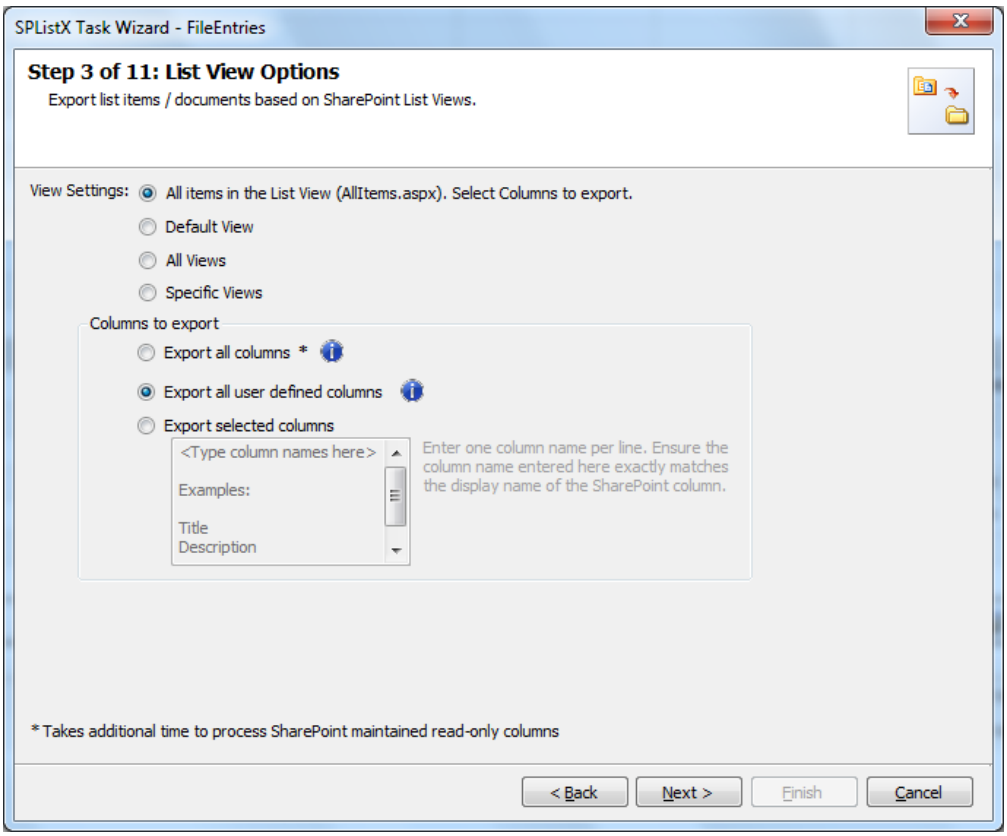
7) Click **Next** to Proceed

4.1.4 List View Options

You can export list items or documents based on SharePoint List views and thereby specify the SharePoint columns to export metadata.

To selectively export SharePoint Views from the list / library, follow the steps outlined below:

1) The **List View Options** wizard step appears as shown below:


SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
<Type column names here>
Examples:
Title
Description
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
* Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

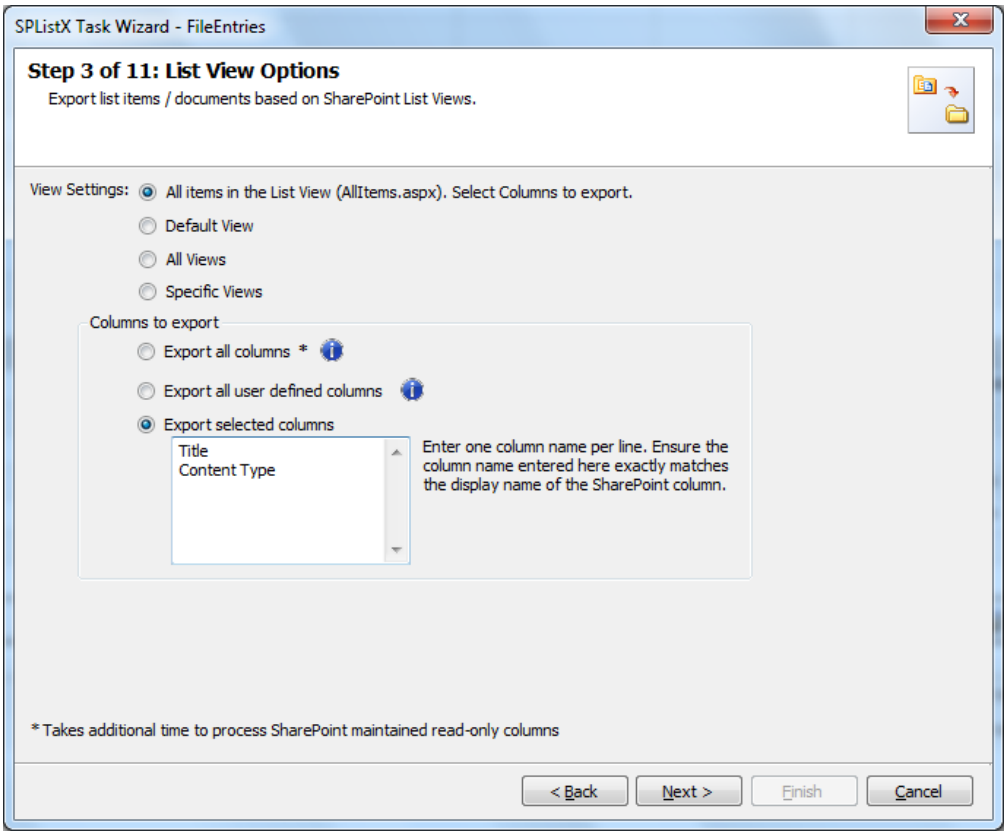
2) Select any one of the following **View Settings** given below:

a) All items in the List View (AllItems.aspx). Select Columns to export. Export all items / documents (including folders) in the list view as it appears in Allitems.aspx web page corresponding to the list. You have the additional option to specify the SharePoint columns to export as per the options below:

i. **Export all columns -** Exports all columns available in the source SharePoint list, including built-in SharePoint columns such as Created, Modified, Approval Status, etc.

ii. **Export all user defined columns -** Exports all columns that are created by a SharePoint user.

iii. **Export selected columns -** Exports columns that are specified in the textbox.


SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
Title
Content Type
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
*Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

b) Default View - Exports all items (including folders) available in the Default view of the given SharePoint list. The SharePoint columns defined in the default view will be exported to the metadata file.

c) All Views - Exports all Views in the SharePoint list. The SharePoint columns defined in the respective list views will be exported to the metadata file.

d) Specific Views - Exports views that are specified in the textbox. The SharePoint columns defined in the respective list views will be exported to the metadata file.

*** Note:**

ViewName macro is applicable only for View based export. SPListX will substitute the name of the processed view wherever applicable.

In view based export,

Content export:

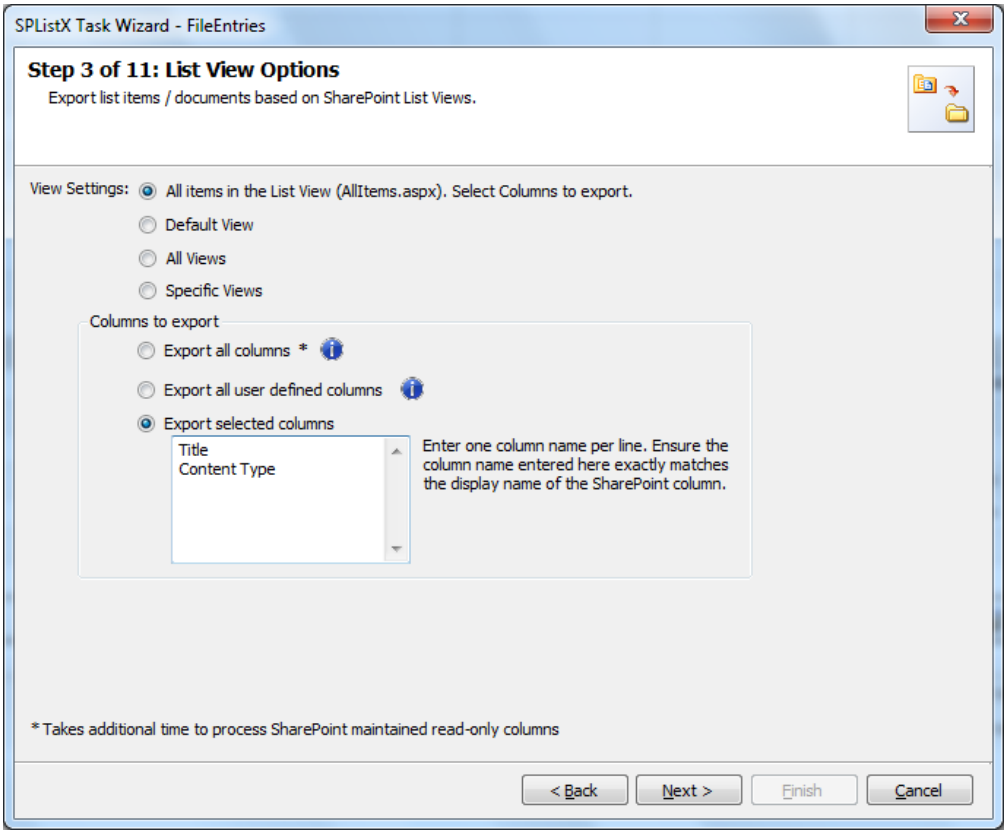
For list / library entries, it creates a new folder with the view name under the list / library name folder in the specified destination location.

For file / folder entries provided for export, it exports the content in the specified export location.

Metadata export:

For list / library entries and for files / folders within them, it exports metadata for columns present in the view.

For file / folder entries provided for export, it exports metadata for all columns (including SharePoint maintained read-only columns), instead of the view based columns.

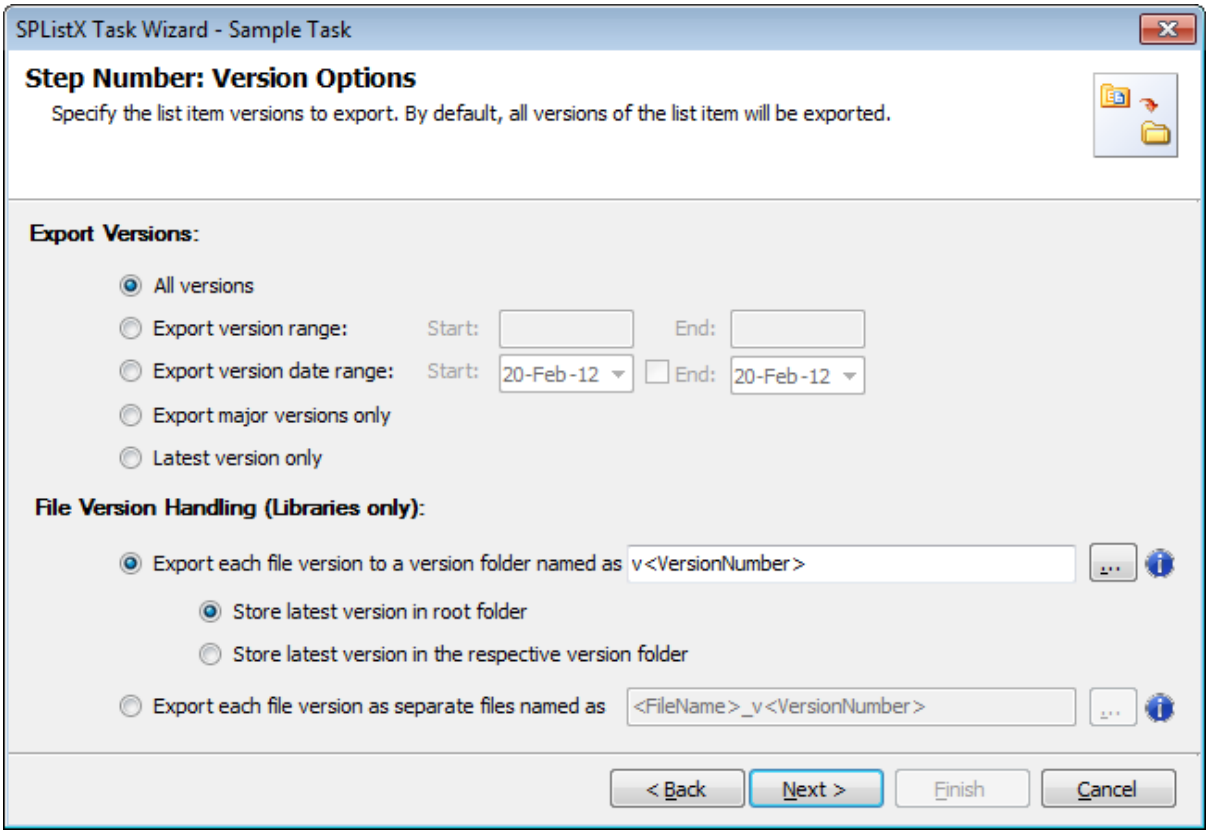

SPListX Task Wizard - FileEntries
Step 3 of 11: List View Options
Export list items / documents based on SharePoint List Views.
View Settings:
All items in the List View (AllItems.aspx). Select Columns to export.
Default View
All Views
Specific Views
Columns to export
Export all columns *
Export all user defined columns
Export selected columns
Title
Content Type
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
* Takes additional time to process SharePoint maintained read-only columns
< Back
Next >
Finish
Cancel

Click **Next** to proceed.

4.1.5 Version Options

To selectively export list item versions to the destination file system location:

1) The **Version Options** step appears as shown below:



2) Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list items exported from the list. Select any one of the following version settings:

a) All versions - Export all list item versions available in the source list.

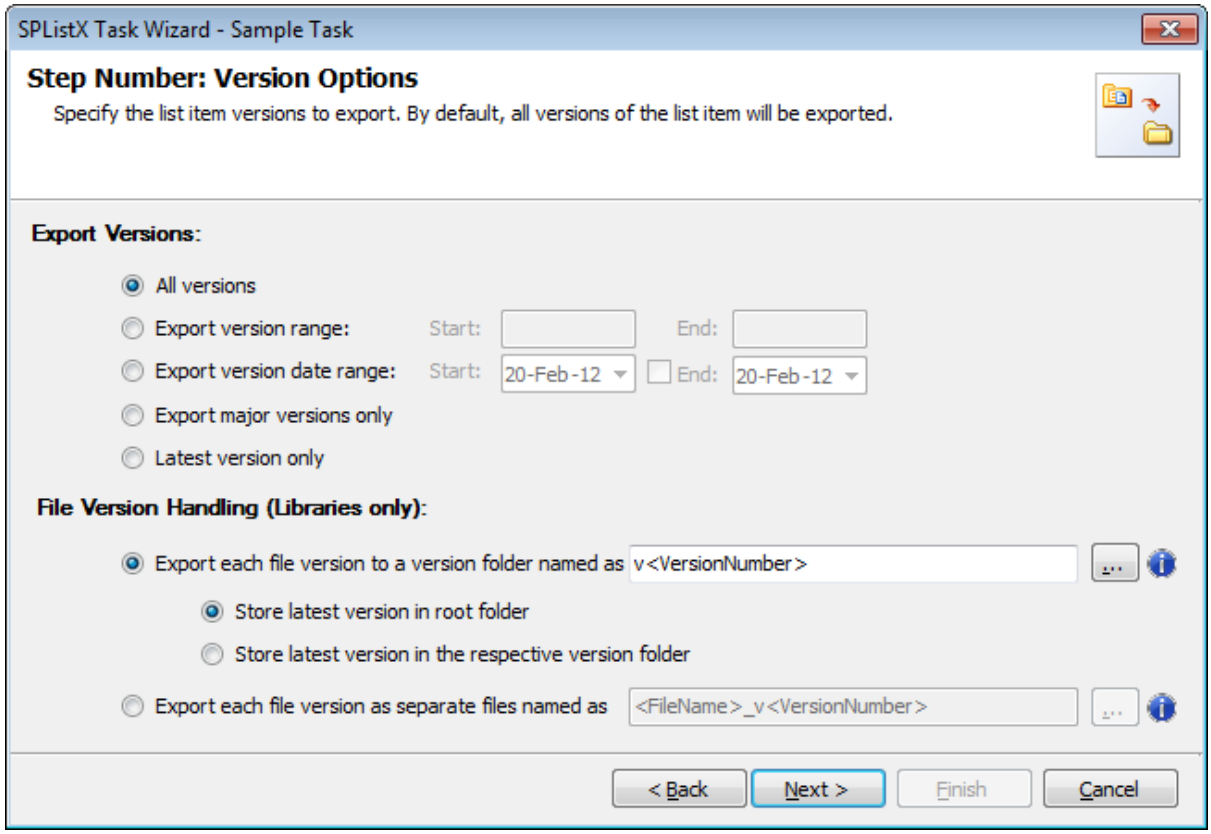
b) Export version range - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.

c) Export version date range - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is Modified date of a list item.

d) Export major versions only - Export the major list item version from the source.

e) Latest version only - Export the latest list item version from the source.

3) File Version Handling:

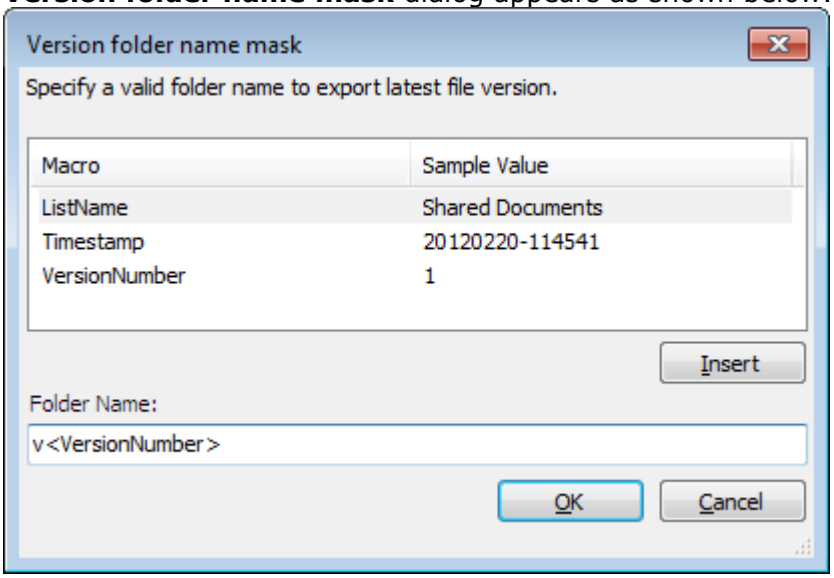


Select *any one* of the following *export options:*

a) Export each version to a version folder named as - This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.

(i) Store latest version in root folder – Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox.

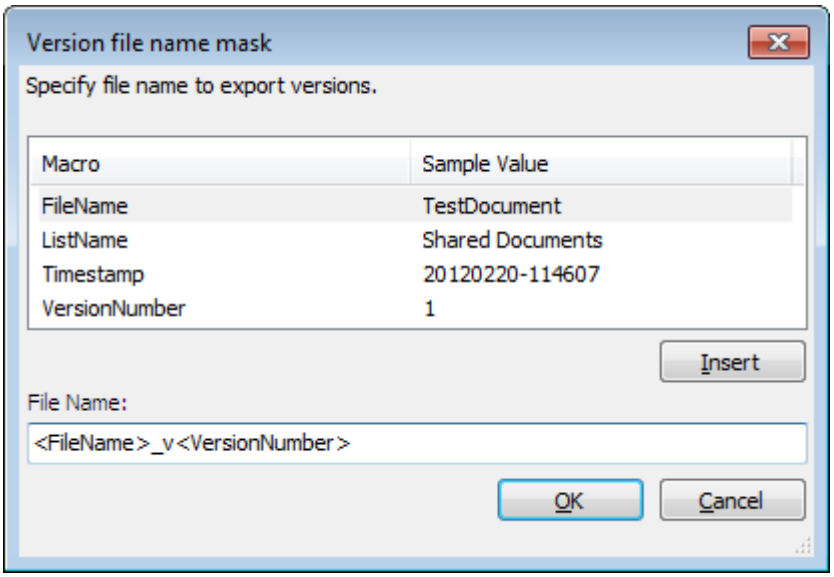
Version folder name mask dialog appears as shown below:



You can use the available macros to construct the new folder name in the **Result** textbox.

(ii) Store latest version in the respective version folder - This option will create a version folder name based on the current file version and export the file into the version folder.

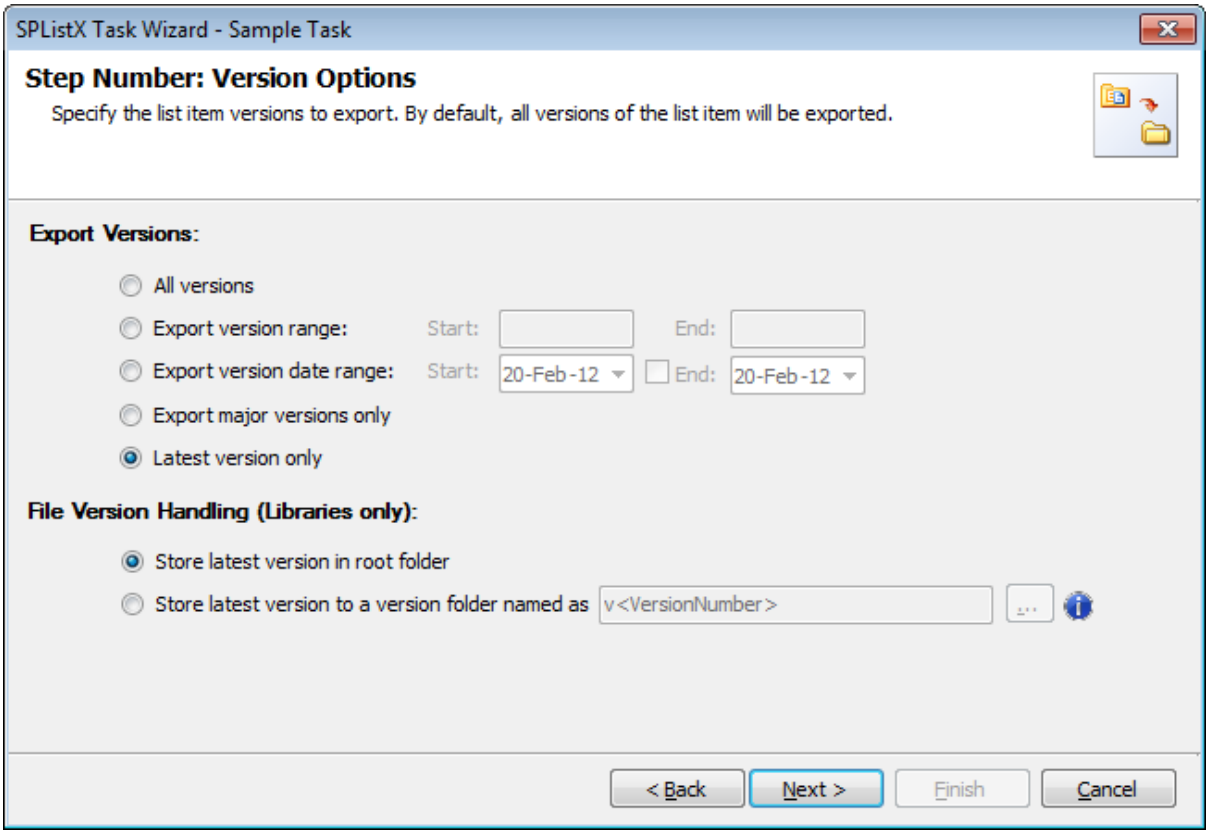
b) Export each file version as separate files named as - Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name**, click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below



You can use the available macros to construct the new file name in the **Result** textbox.

4) Click **Next** to proceed.

For **Latest Version Only** option in the **Export Versions**, you have the option to export the **latest file version** to the root folder or export it to the respective version folder. The **File Version Handling** settings appear as shown below:



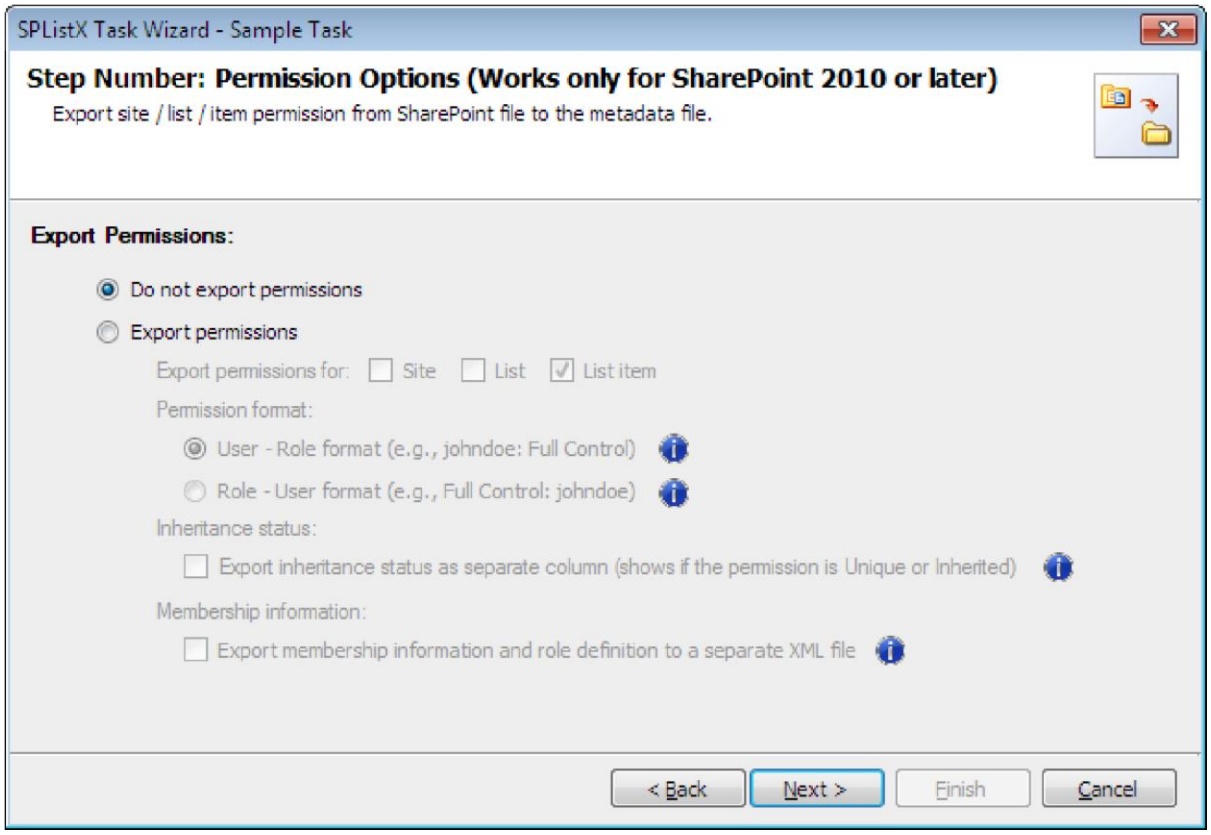
a) **Store latest version in root folder -** Export the latest version in the root folder itself

b) **Store latest version in the respective version folder -** Creates a latest version folder and export the latest file version in the latest version folder.

4.1.6 Permission Options

SPListX can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 or later environment.

1) The **Permission options** specification wizard step appears as shown below:

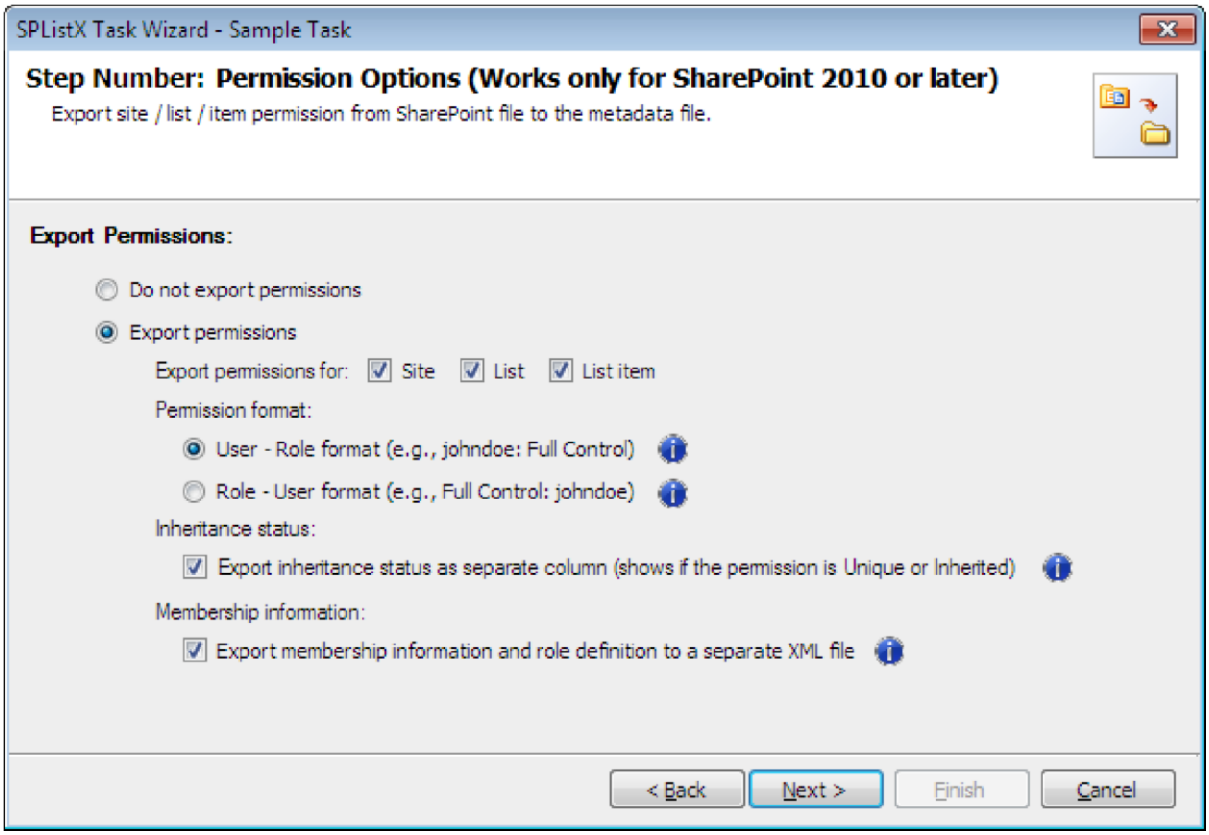

SPListX Task Wizard - Sample Task
Step Number: Permission Options (Works only for SharePoint 2010 or later)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for:
Site
List
List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export membership information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

Export Permissions:

a) Do not export permissions - This option will not export permissions to the metadata file.

b) Export permissions - This option will export permissions based on the user specified options.

The export permissions options appear as shown below:


SPListX Task Wizard - Sample Task
Step Number: Permission Options (Works only for SharePoint 2010 or later)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export membership information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permission for:** options.

3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:

   a) User - Role format – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
   b) Role - User format – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.

4) Inheritance status - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.

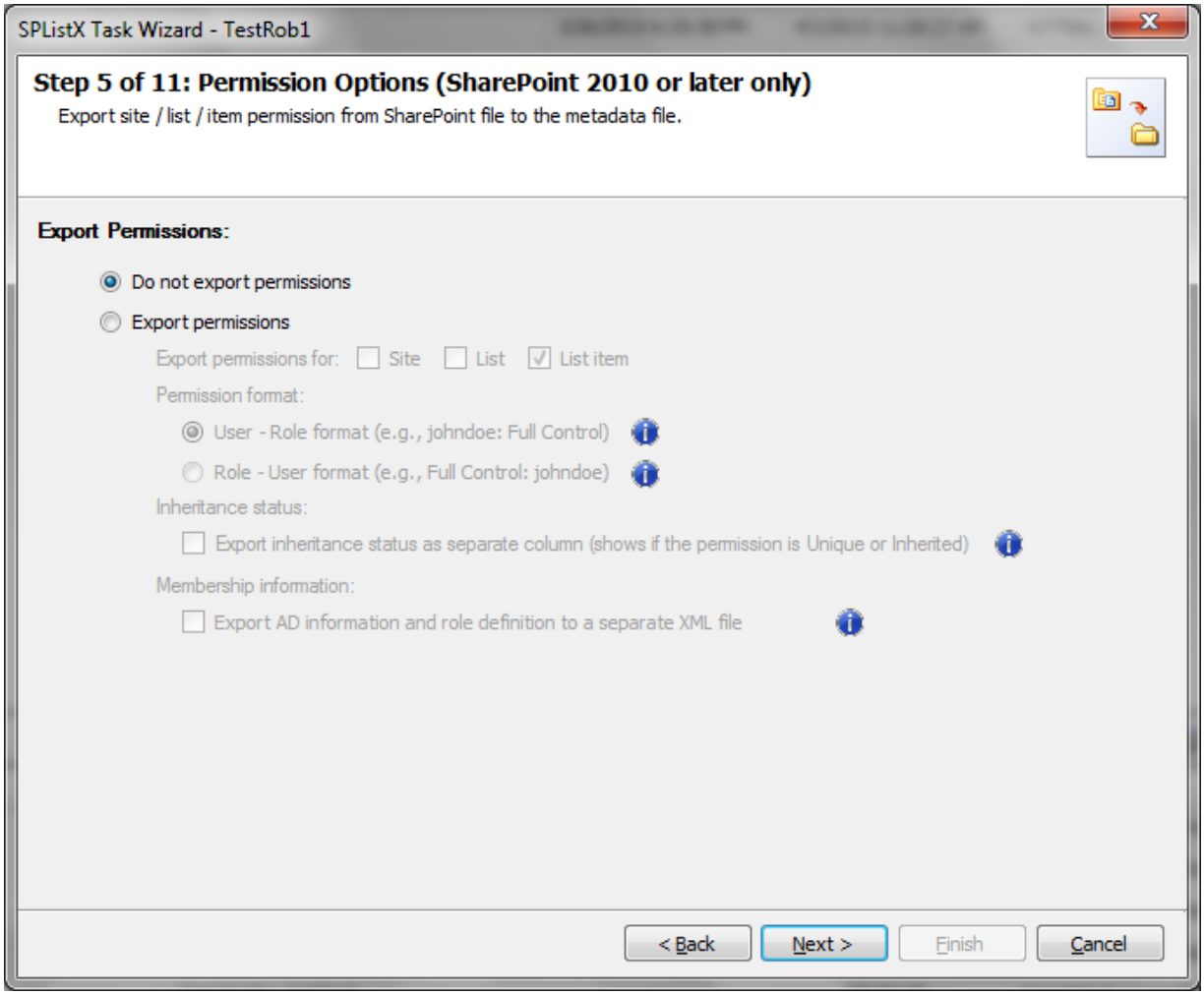
5) Membership information - This option exports membership and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name _membershipinformation and _roledefinition. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information.

6) Click **Next** to Proceed.

4.1.6 Permission Option

SPListX can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 or later environment.

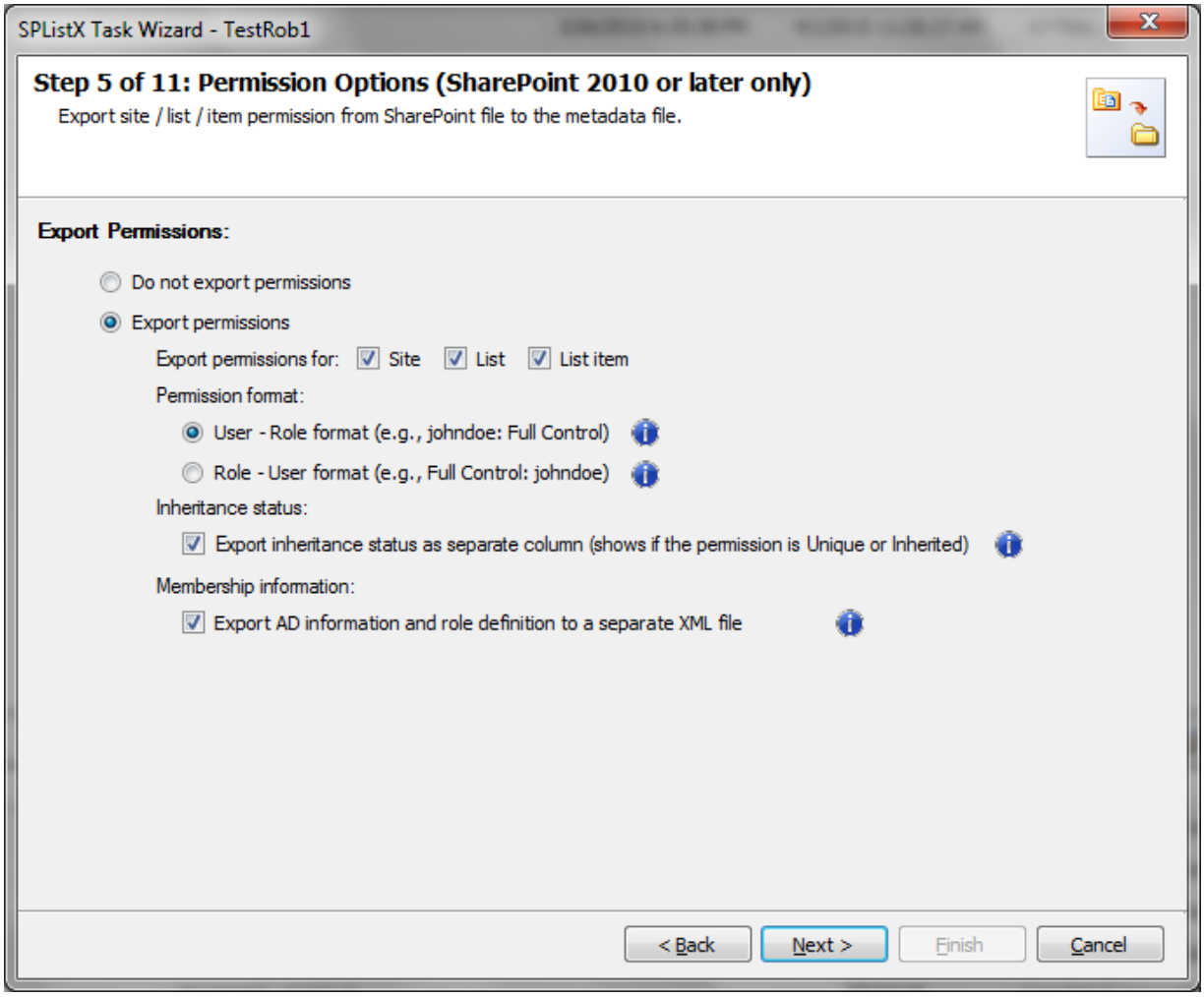
1. The Permission options specification wizard step appears as shown below:


SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

Export Permissions:

a. **Do not export permissions** - This option will not export permissions to the metadata file.

b. **Export permissions** - This option will export permissions based on the user specified options. The export permission options appears as shown below:


SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

2. You can export permissions for Site / List / List item to the metadata file depending on the user selection. Check appropriate checkboxes in Export permission for: options.

3. Specify the Permission format to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:

a. **User - Role format** – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.

b. **Role - User format** – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.

4. **Inheritance status** - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.

5. **Membership information** - This option exports AD informtion and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name _membershipinformation and _roledefinition. The user account that connects to SharePoint must have (System Account) permission to retrieve respective

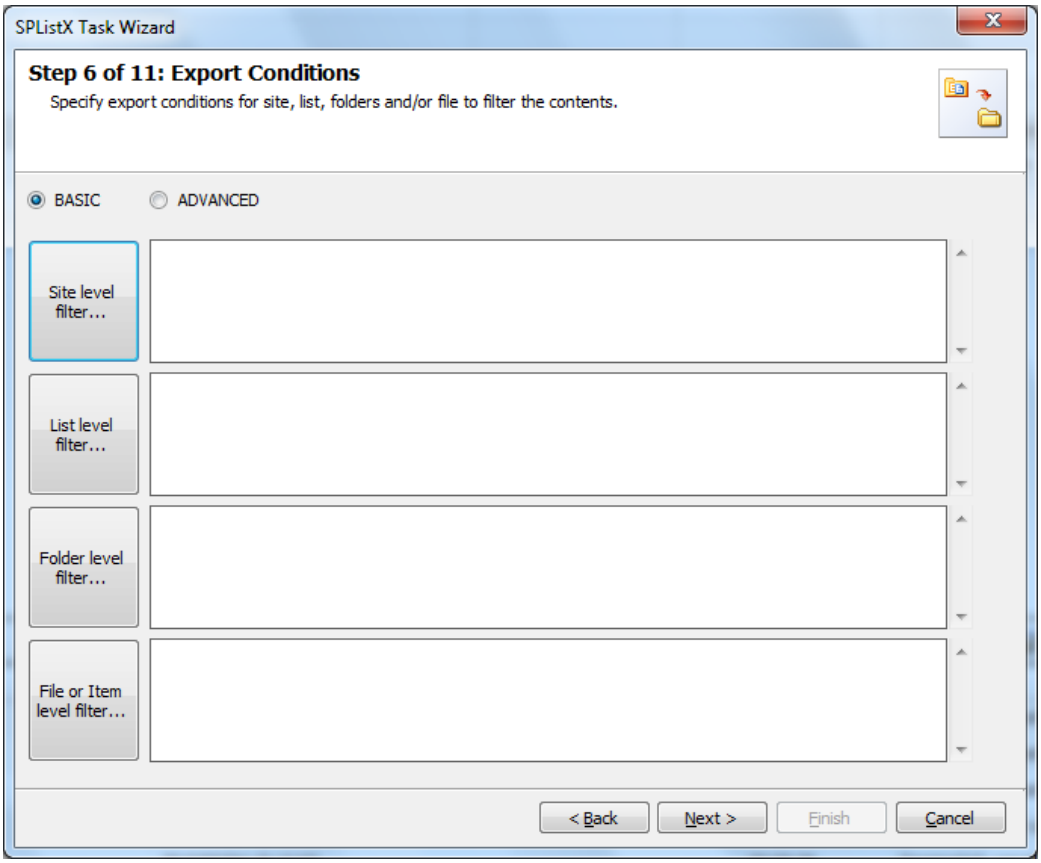
membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information. SPListX will enumerate only the globally declared domain groups and retrieve membership information.

6. Click **Next** to proceed

4.1.7 Export Conditions

SPListX can export folders, files and list items (including file attachments) from a SharePoint list or library based on certain export conditions. The conditions can be created by using SharePoint columns in the source list or library.

1) The **Export Conditions** step appears as shown below:



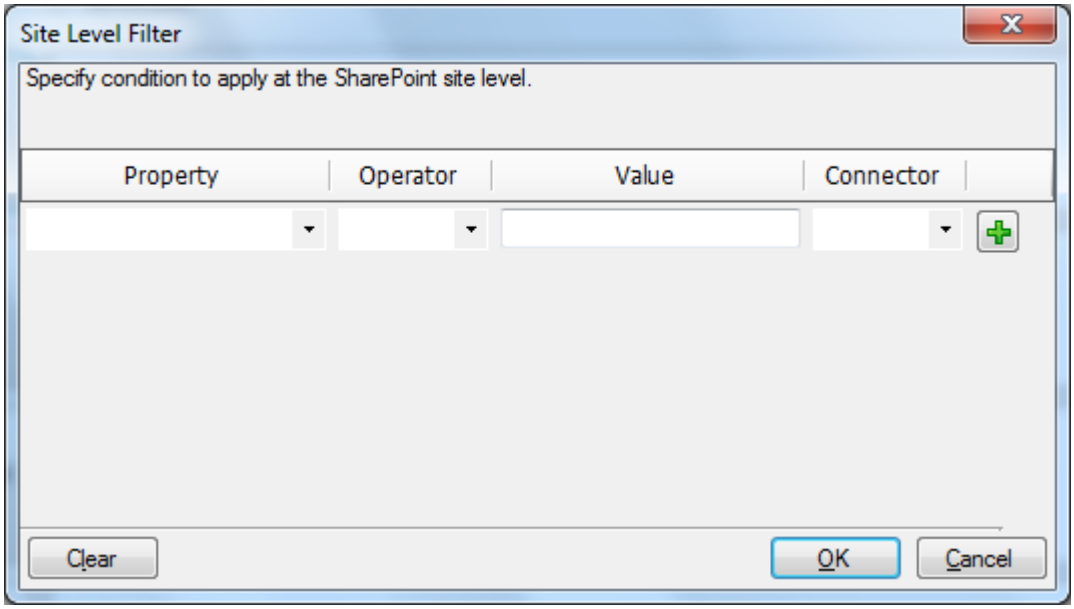
2) You can specify one of the following methods of exporting conditions:

- BASIC
- ADVANCED

2.1) BASIC

a. Site Level Filters

Click Site level filter to specify the filter conditions. The Site Level Filter dialog appears as below:



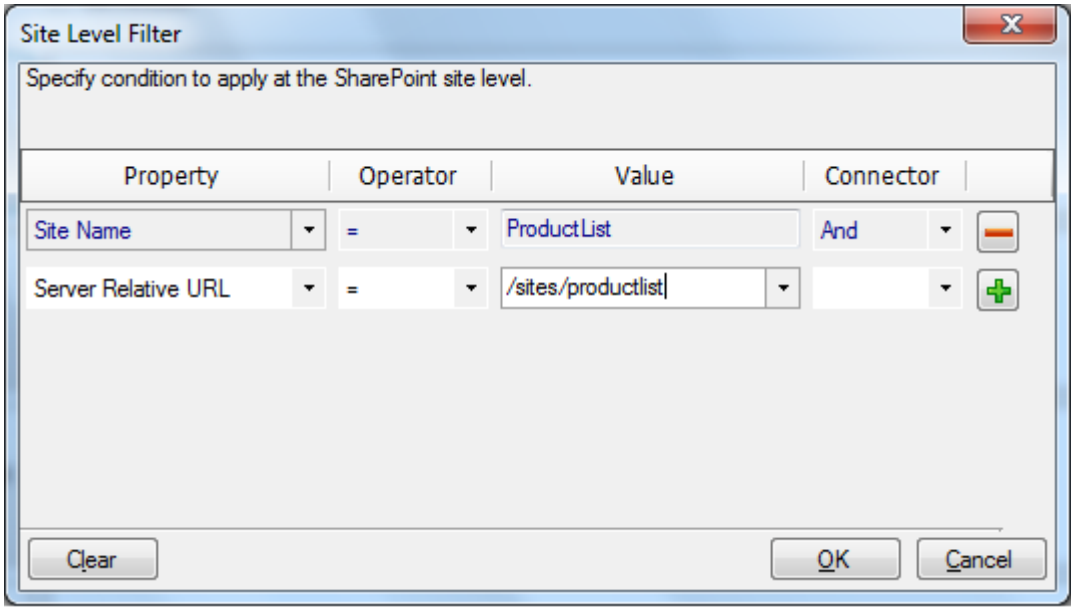
You can specify the export filters by selecting the site name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

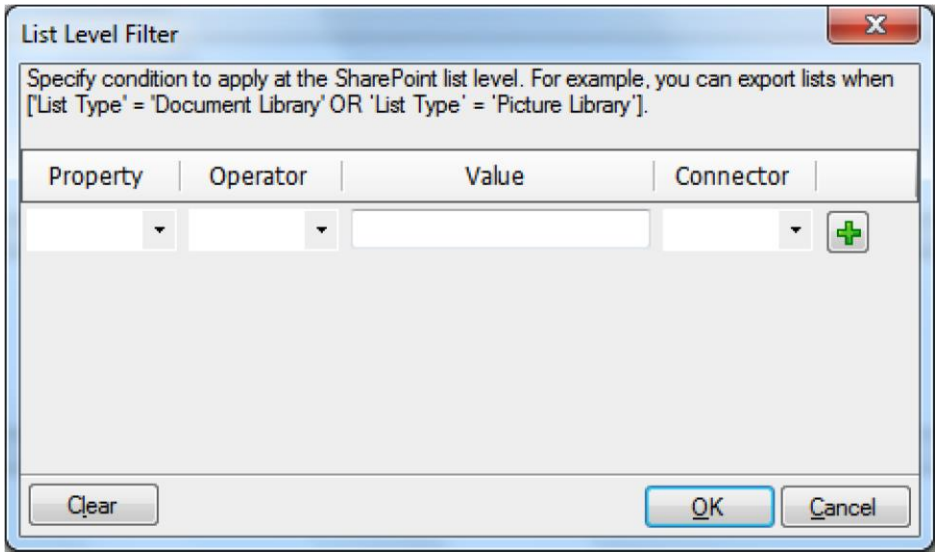
Click **Clear** to remove all the filters specified.



SPListX will export the sites that satisfy the export conditions depending on the option selected by the user.

b. List Level Filters

Click **List level filter** to specify the filter conditions. The **List Level Filter** dialog appears as below:


List Level Filter
Specify condition to apply at the SharePoint list level. For example, you can export lists when ['List Type' = 'Document Library' OR 'List Type' = 'Picture Library'].
Property
Operator
Value
Connector
Clear
OK
Cancel

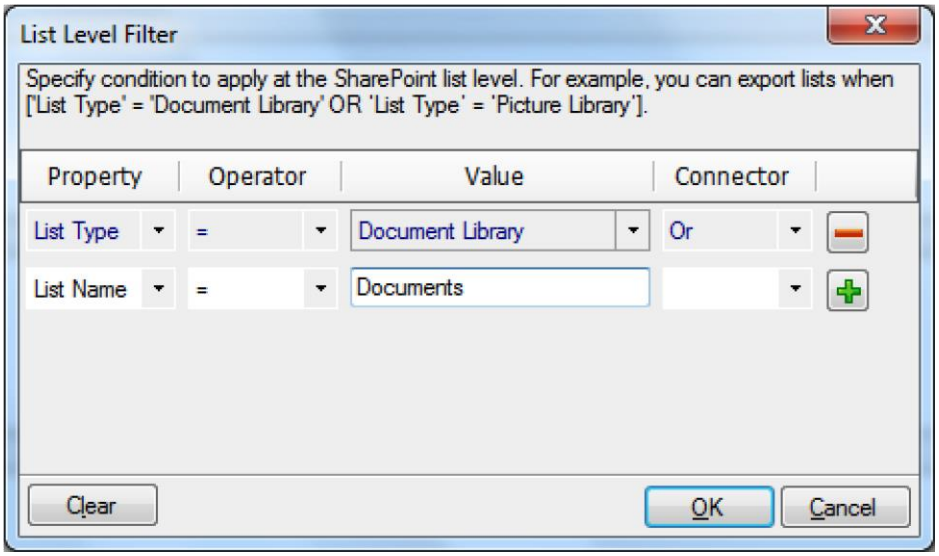
c. You can specify the export filters by selecting the field name and by specifying a value with necessary operator. You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical

operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

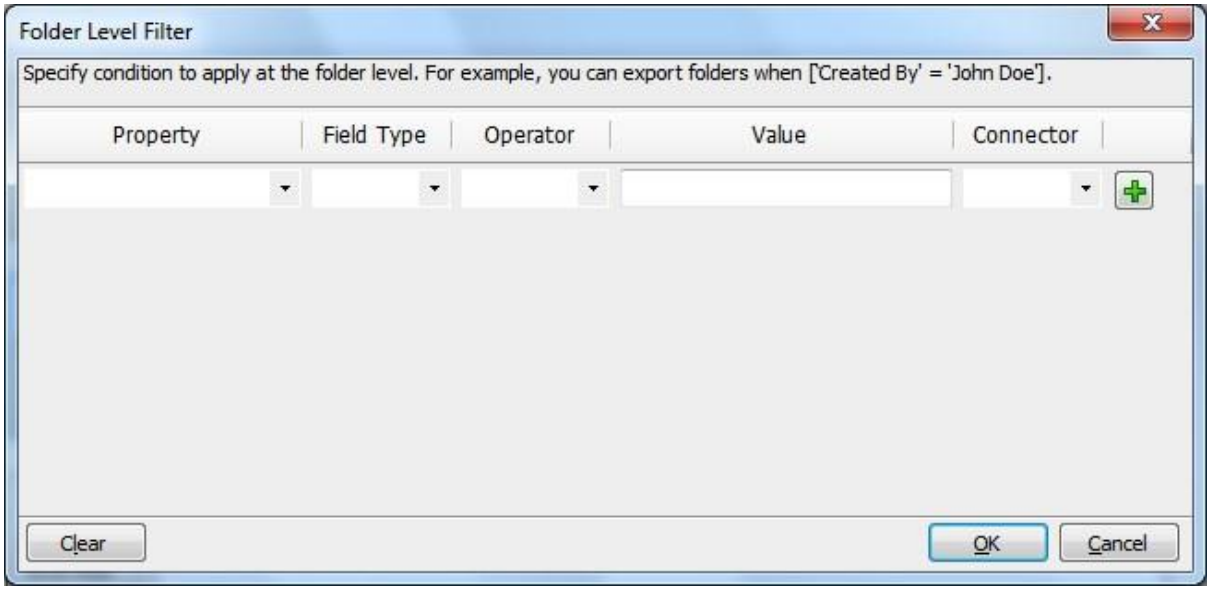
Click **Clear** to remove all the filters specified.



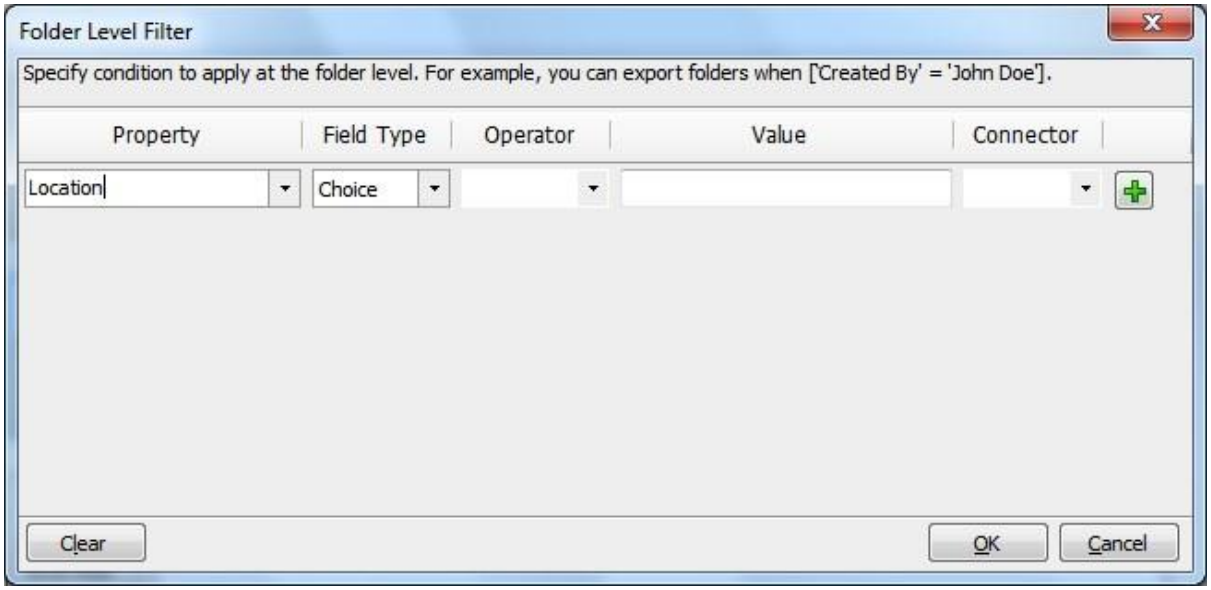
SPListX will export the lists that satisfy the export conditions depending on the option selected by the user.

d. Folder Level Filters

Click **Folder level filter** to specify the filters. The **Folder Level Filter** dialog appears as below:



d. You can enter the SharePoint Column Name in the Property drop down. Select the data type of the specified SharePoint Column in Field Type drop down.

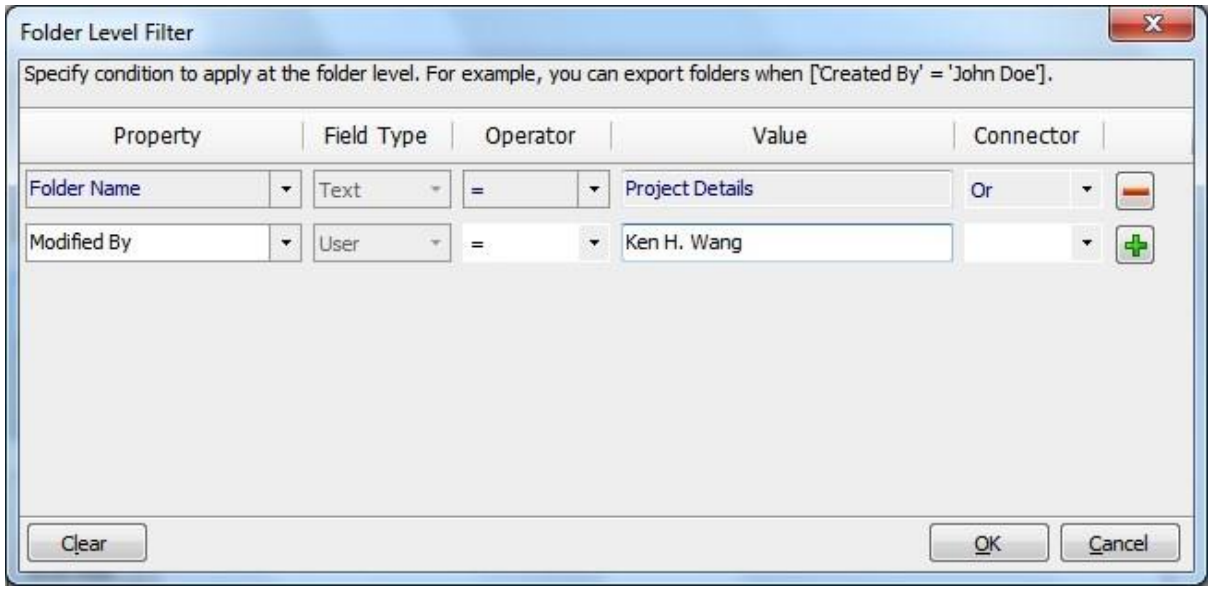


e. You can specify the export filters by selecting the field name and by specifying a value with necessary operator. You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed with the use of logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

Click **Clear** to remove all the filters specified.



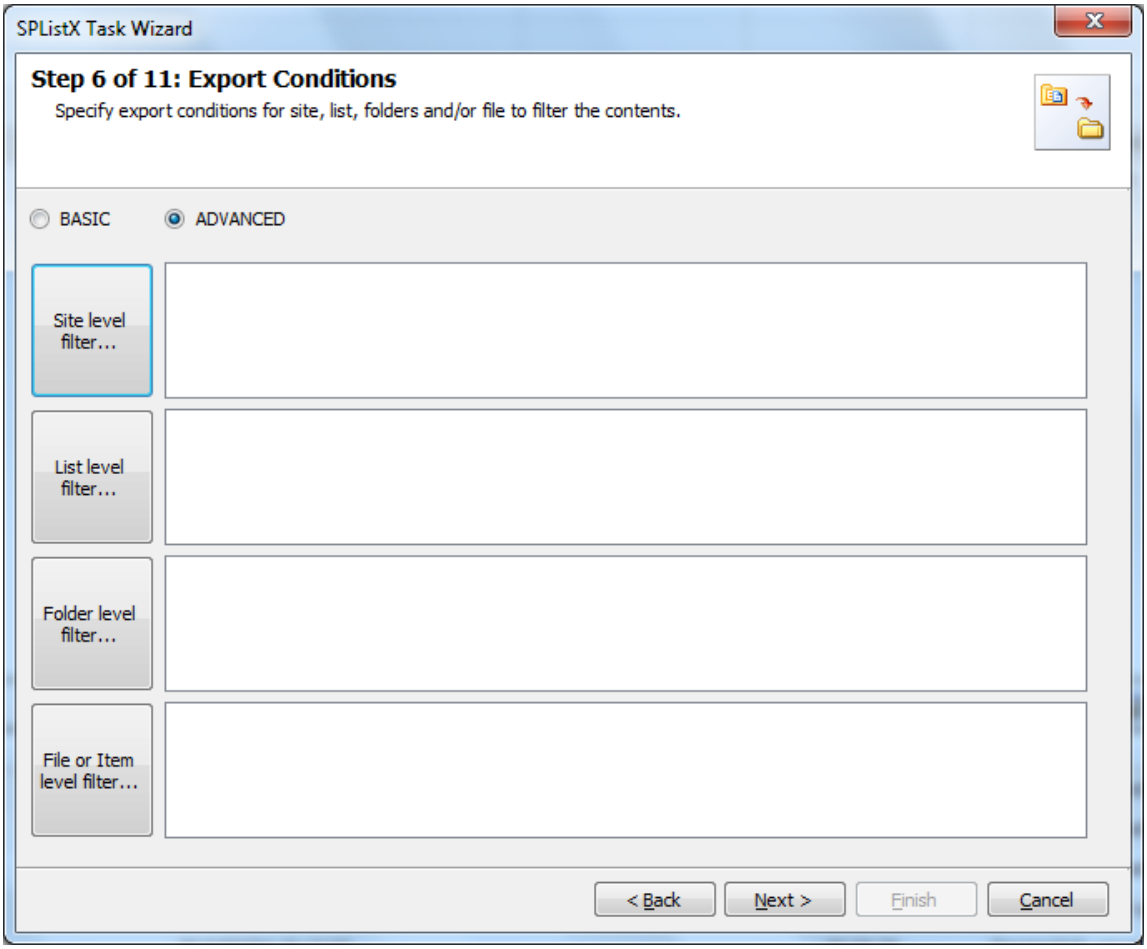
SPListX will export the folders that satisfy the export condition depending on the option selected by the user.

f. File or Item Level Filters

Same as Folder Level Filters

g. Click **Next** to Proceed.

ADVANCED



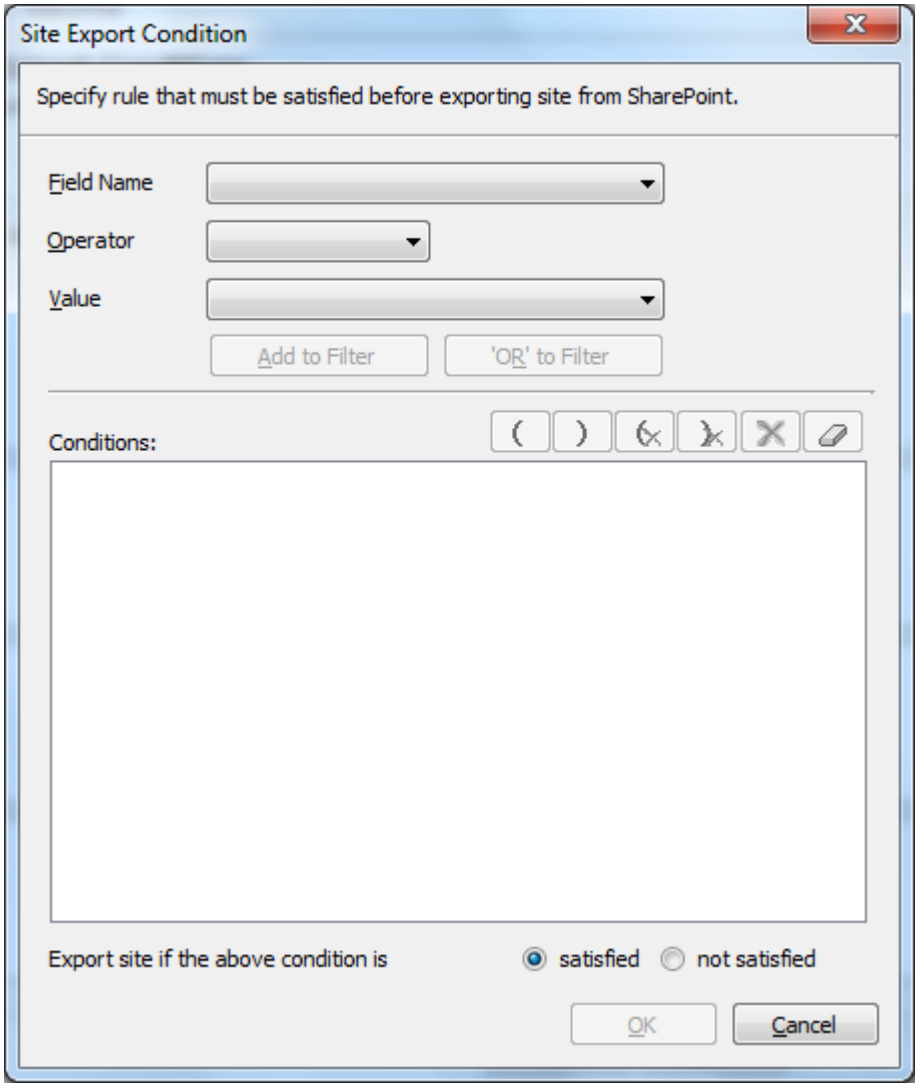
You can specify export conditions at three levels:

- List Level Filter
- Folder Level Filter
- File or Item Level Filter

a. Site Level Filters

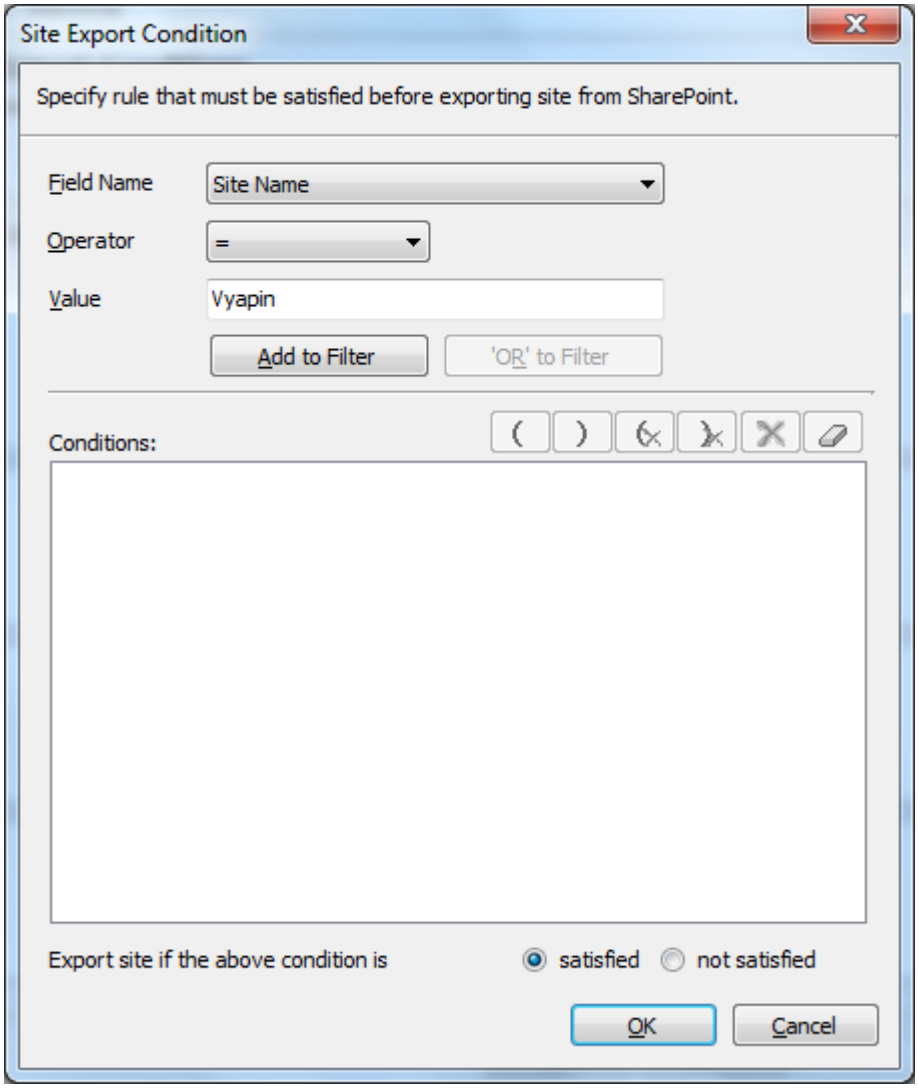
Click **Site level filter** to specify the conditions

The Site Export Conditions Dialog appears as shown below:



You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



SPListX will export the sites that satisfy the export condition or export the sites that do not satisfy the export condition depending on the option selected by the user:

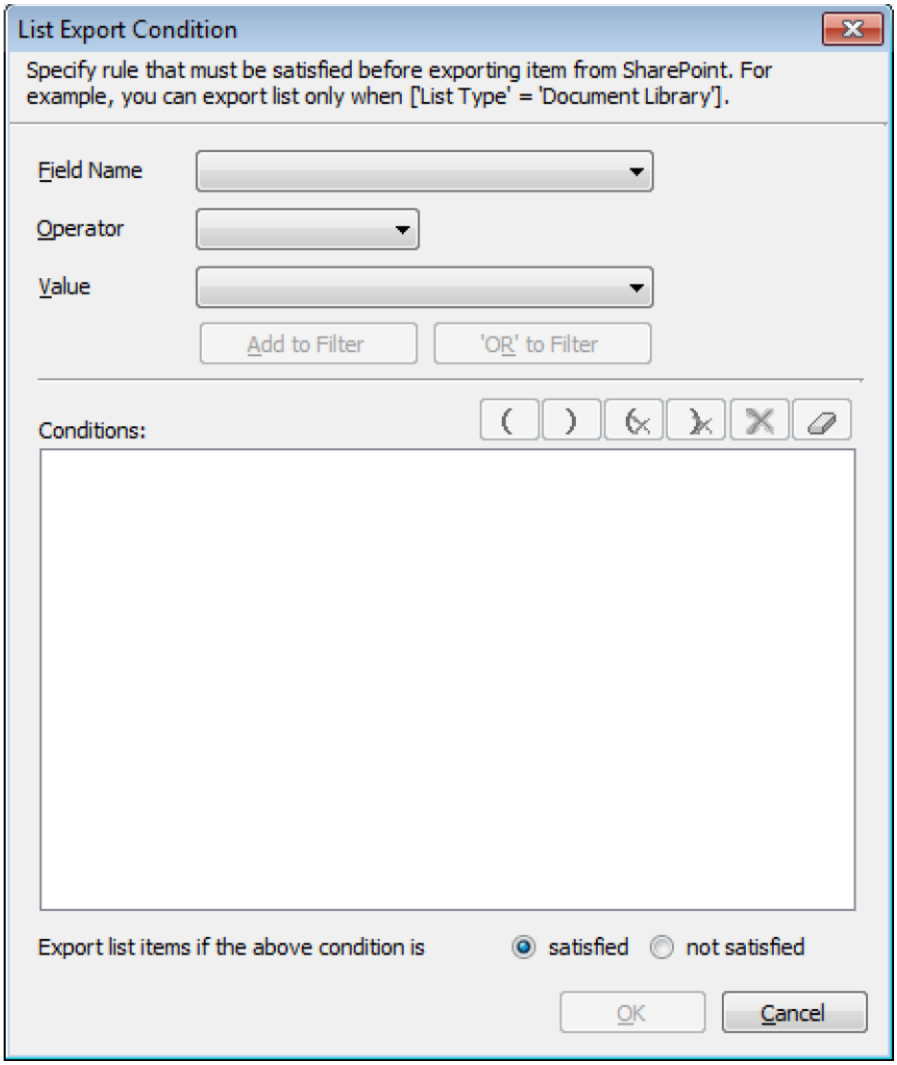
Export sites if the above conditions are satisfied - Sites that satisfy the condition will be marked for export.

Export sites if the above conditions are not satisfied - Sites that do not satisfy the condition will be marked for export.

b. List Level Filters

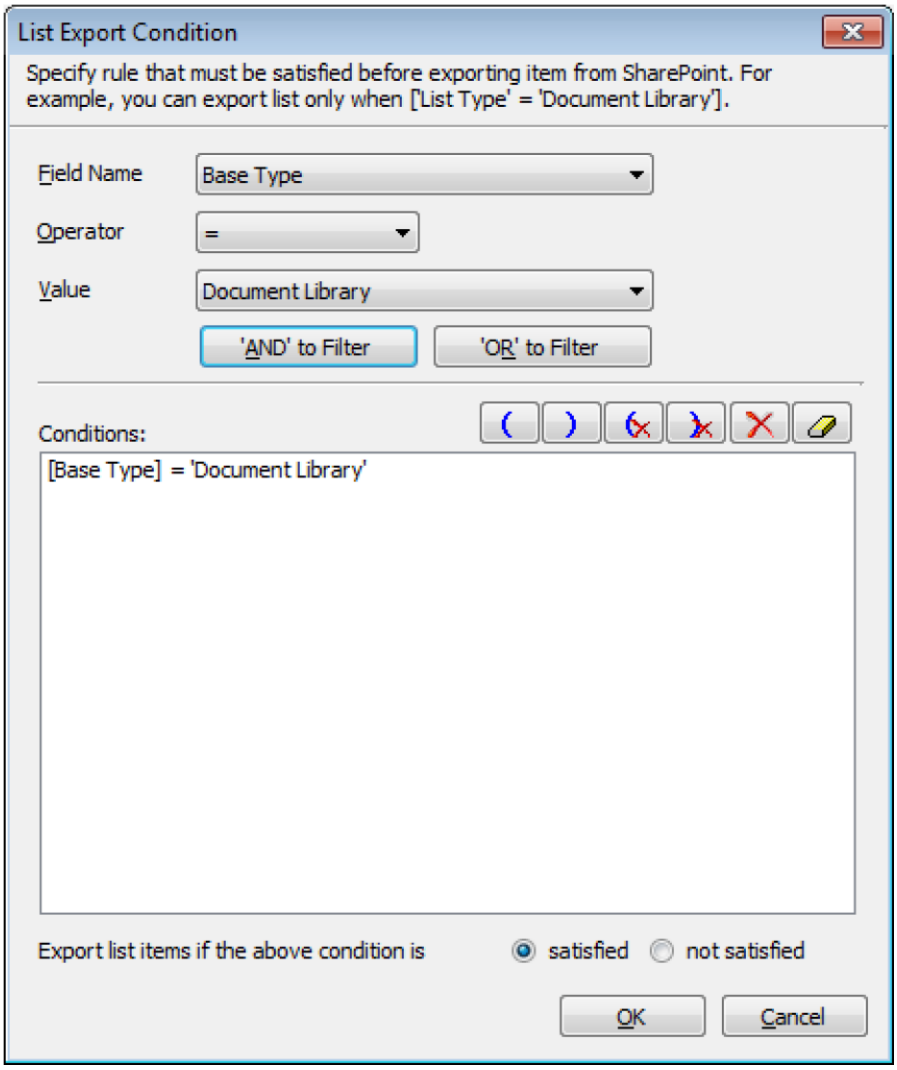
Click List level filter to specify the conditions

The List Export Conditions Dialog appears as shown below:


List Export Condition
Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library'].
Field Name
Operator
Value
Add to Filter
'OR' to Filter
Conditions:
( ) & | X
Export list items if the above condition is
satisfied
not satisfied
OK
Cancel

c. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



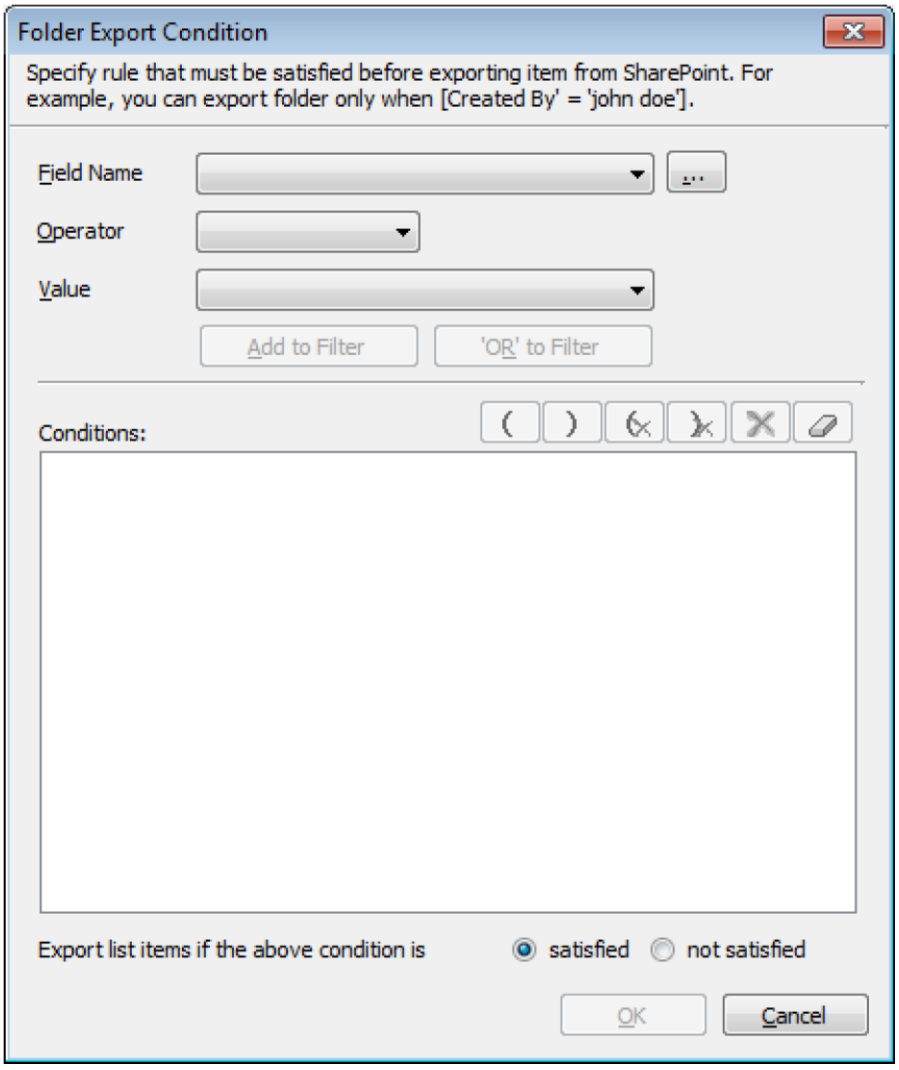
d. SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- Export list items if the above conditions are satisfied - Lists that satisfy the condition will be marked for export.
- Export list items if the above conditions are not satisfied - Lists that do not satisfy the condition will be marked for export.

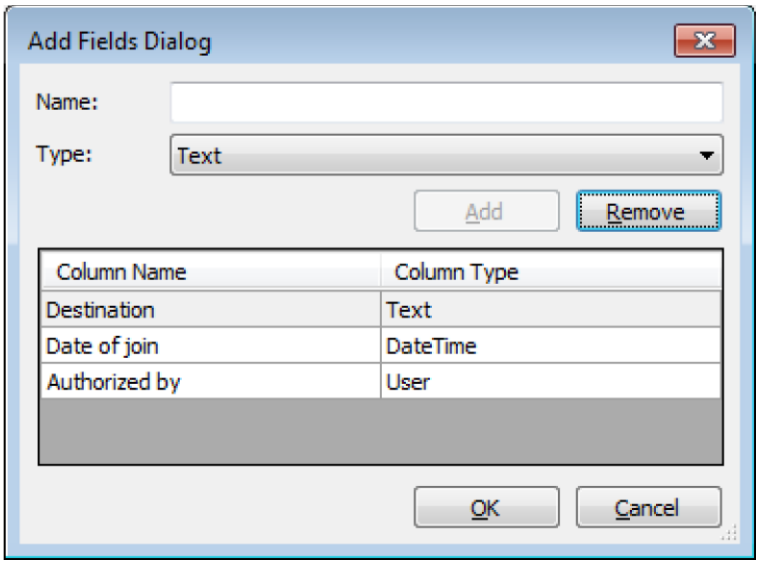
e. Folder Level Conditions

Click Folder level filter to specify the conditions

The Folder Export Conditions Dialog appears as shown below:



f. Click (...) button to add the SharePoint columns in Field Name dropdown. The Add Fields Dialog appears as shown below:



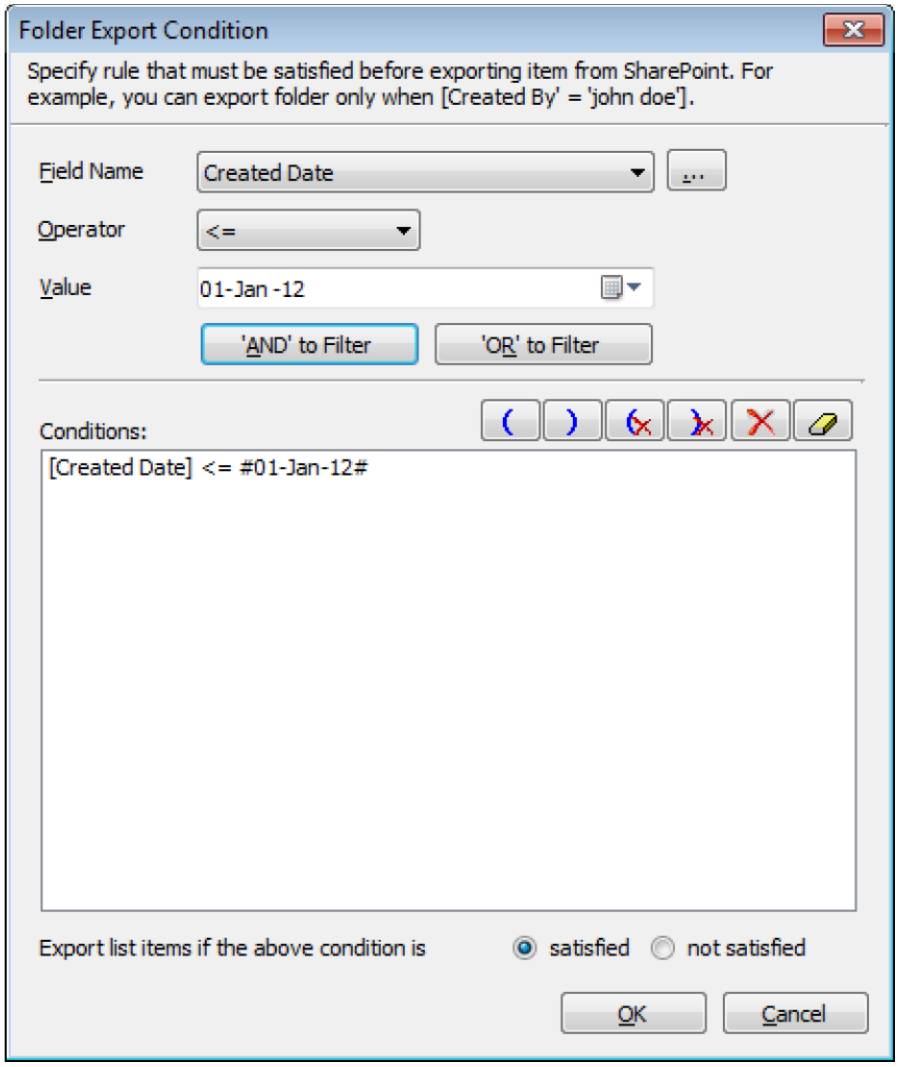
Specify the column name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Click Add button to add the columns to the fieldname dropdown list.

Click Remove button to remove the columns from the fieldname dropdown list.

g. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



h. SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- Export list items if the above conditions are satisfied - Folders that satisfy the condition will be marked for export.

- Export list items if the above conditions are not satisfied - Folders that do not satisfy the condition will be marked for export.

i. File or Item Level Filters

Same as Folder Level Filters

3) Click **Next** to proceed.

Examples of Export Conditions

SPListX exports folders & files / attachments along with metadata to the file system location based on export conditions defined in the export task. Export conditions can be constructed using metadata columns and its values.

A few examples of list conditions are as follows:

Export Condition	Description
[Server Relative URL] = '/site name/subsite name/lists/list name'	Exports list items that have server relative URL as '/site name/subsite name/lists/list name' For example: [Server Relative URL] = '/vyapin/sharepoint/lists/Product List'
[List Name] = 'Cities'	Exports list item and attachments of lists named as 'Cities'
[List Type] = 'Document Library'	Exports documents from all document libraries in the entire web application.
[Base Type] <> 'Document Library'	Exports list items and attachments of all custom lists (other than document libraries) that are present in the entire web application.

A few examples of item and folder export conditions are as follows:

Export Condition	Description

[Modified Date] > '09/09/2010' **[Created By] = 'John Doe'** **[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#** **[Content Type] = 'Document'** **[Modified By] = 'John Doe'**	Assuming the date specified by the user is in MM/DD/YYYY format and with this condition, SPListX exports list items that have been modified after 9th September 2009. Exports list items that have been created by 'John Doe' Assuming the date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010. Exports list items that have content type as 'Document' Exports list items that have been modified by 'John Doe'

The following section describes the data types supported by SharePoint and an example of how to state the export condition.

SharePoint Data Type	Example	Description
Yes/No	[Document Verified] = 'Yes'	SPListX exports list items that have the 'Document Verified' value set to 'Yes'.
Text	[Title] <> 'Research'	SPListX exports only list items that do not have 'Research' as value for 'Title' field.
Date and Time	[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#	Assuming date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.
Number	[Product ID] > 10 OR [Product ID] <=100	SPListX exports list items that have 'Product ID' value lies in between 10 to 100.
Currency	[Product Cost] = 100	SPListX exports list items that have 'Product Cost' value equal to 100.

Choice	[City] = 'New York' [City] = 'London;Paris;Singapore'	Text or Number values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'City' column value set as 'London', 'Paris' and 'Singapore'.
Lookup	[Product Code] = 100 [Product Code] = 123ABC;154XYZ	The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items
		that have '123ABC' and '154XYZ' as value for 'Product Code' field.
People or Group	[Document Reviewed by] ='John Doe' [Document Reviewed by] ='John Doe; Jane Doe'	User or group values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'Document Reviewed by' value set to 'John Doe' and 'Jane Doe'.

Incremental Export in SPListX

Apart from relational operators, SPListX allows you to construct flexible export conditions by using the **Changed** operator for periodic import for the fields 'Created Date (SharePoint)' and 'Modified Date (SharePoint)'. The following built-in values can be used for this operator:

Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Update in SharePoint, Since Last Export in SPListX, Last 7 days and Last 14 days.

By using **Changed** operator, you can filter the list items based on the above mentioned values from SharePoint list.

For example, if you need to migrate list items that are modified in SharePoint today, you can specify an export condition as stated below:

[Modified Date] Changed [Today]

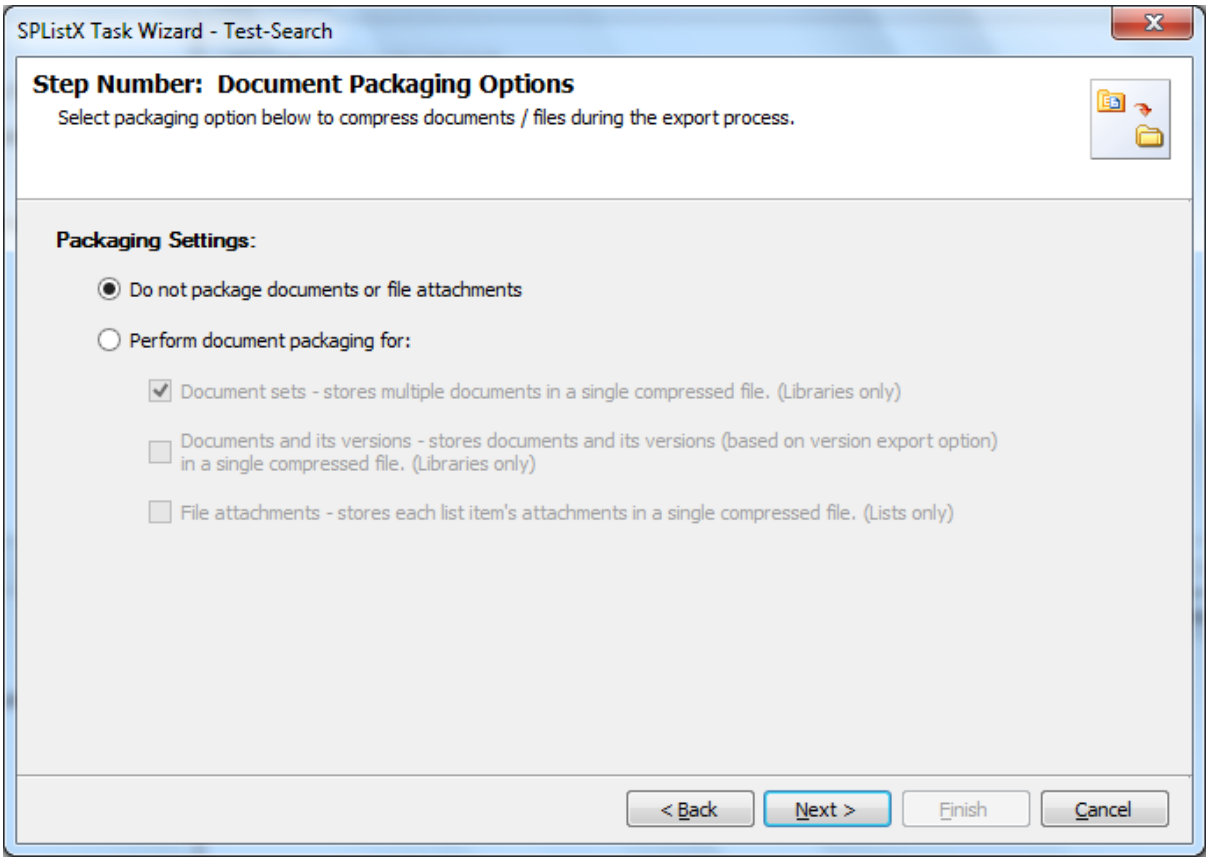
Operator & Value	Description	An Example	Result/Remarks
Changed To-day	Exports list items that are created or modified in the present day (at the time of export) in SharePoint.	[Modified Date] Changed [Today]	SPListX compares the source list item modified date value with the current day (at the time of export) and exports the list items which are modified on the current day.
Changed Yesterday	Exports list items that are created or modified yesterday (at the time of	Created Date] Changed [Yesterday]	SPListX compares the source list item created date value with yesterday
	export) in SharePoint.		(day before at the time of export) and migrates the matching list items.
Changed This Week	Exports list items that are created or modified in the current week.	[Modified Date] Changed [This Week]	SPListX checks the source list item's modified date value and exports the items that are changed in the current week.
Changed This Month	Exports list items that are created or modified in the current month.	[Modified Date] Changed [This Month]	SPListX checks the source list item's modified date value and exports the items that are changed in the current month.
Changed Last Week	Exports list items that are created or modified in the last week.	[Created Date] Changed [Last Week]	SPListX checks the source list item's created date value and exports those items that are changed in last (previous) week.
Changed Last Month	Exports the list items that are created or modified in the last month.	[Modified Date] Changed [Last Month]	SPListX checks the source list item's modified date value and exports those items that are changed in last (previous) month.

Changed Last 7 days	Exports list items that are created or modified in the last 7 days.	[Modified Date] Changed [Last 7 days]	SPListX checks the source list item's modified date value and exports the items that are changed in the last 7 days.
Changed Last 14 days	Exports list items that are created or modified in the last 14 days.	[Modified Date] Changed [Last 14 days]	SPListX checks the source list item's modified date value and exports the items that are changed in the last 14 days.

4.1.8 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets, document / file versions and file attachments as packaged contents grouped together. Follow the steps outlined below to store multiple document versions, document sets and file attachments grouped together in the file system / file share.

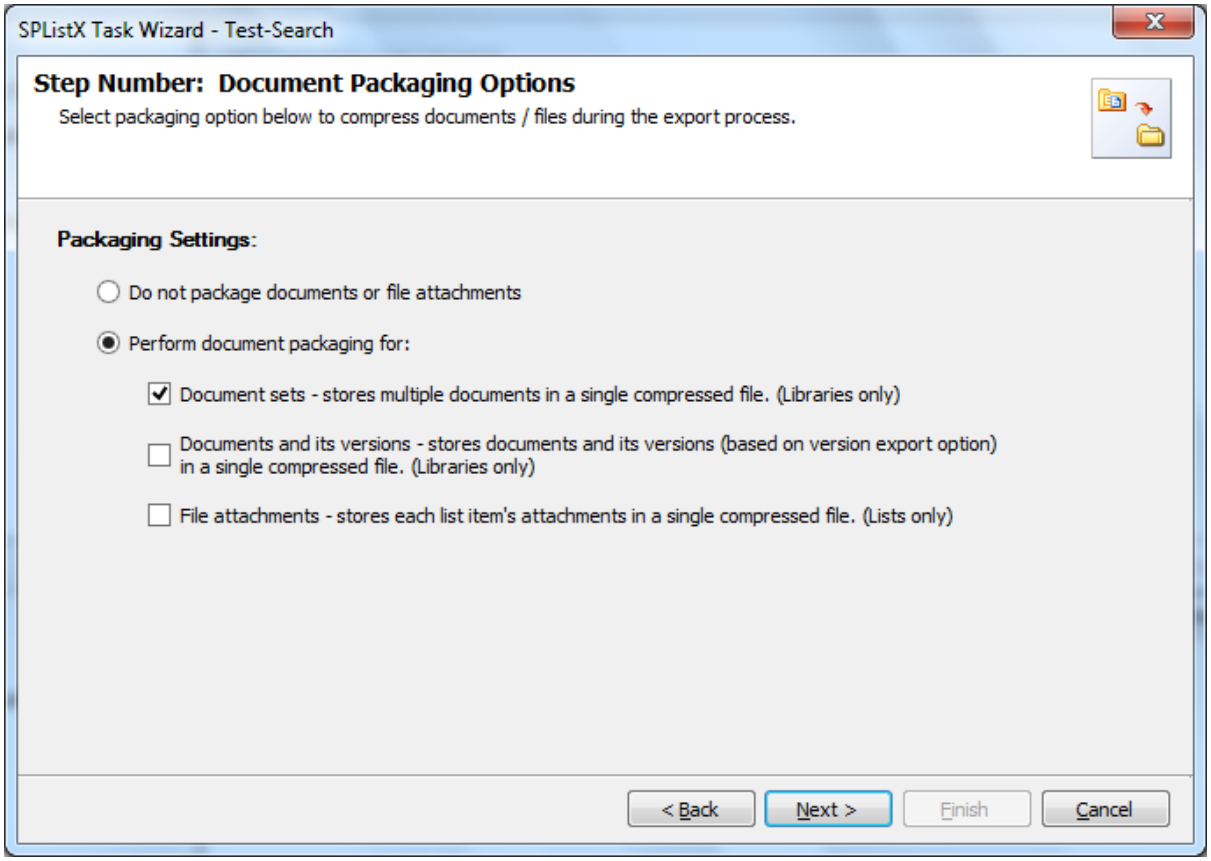
1) The **Document Packaging** Options step appears as shown below:


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

2) Select **Packaging Settings** from the options outlined below:

a) Do not package documents or file attachments: SPListX will not package the exported documents or file attachments.

b) Perform document packaging for: Document package will be created for each exported document set, file version and file attachment based on the option selected below. If the file already exists in the package, File Settings options will be applied.


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

i. Document sets - This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.

ii. Documents and its versions - This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in Versions Settings wizard step.

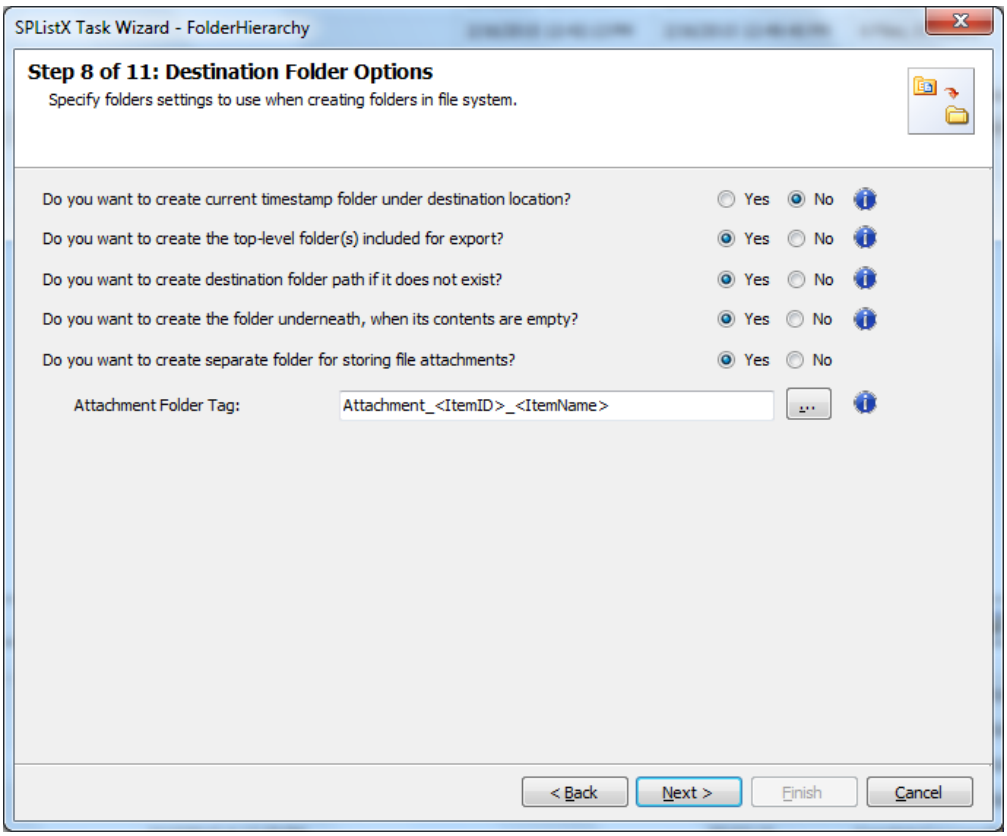
iii. File Attachments - This option will package each list item's attachment(s) into a single compressed file. The compressed package is created in the name of listitem ID.

3) Click **Next** to Proceed to the Next Step.

4.1.9 Destination Folder Options

SPListX will create destination folders based on the following options given below:

1) The **Destination Folder options** specification wizard step appears as shown below:


SPListX Task Wizard - FolderHierarchy
Step 8 of 11: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
...
< Back
Next >
Finish
Cancel

2) Select from the following options:

a) Do you want to create current timestamp folder under destination location? - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).

b) Do you want to create top-level folder(s) included for export? - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

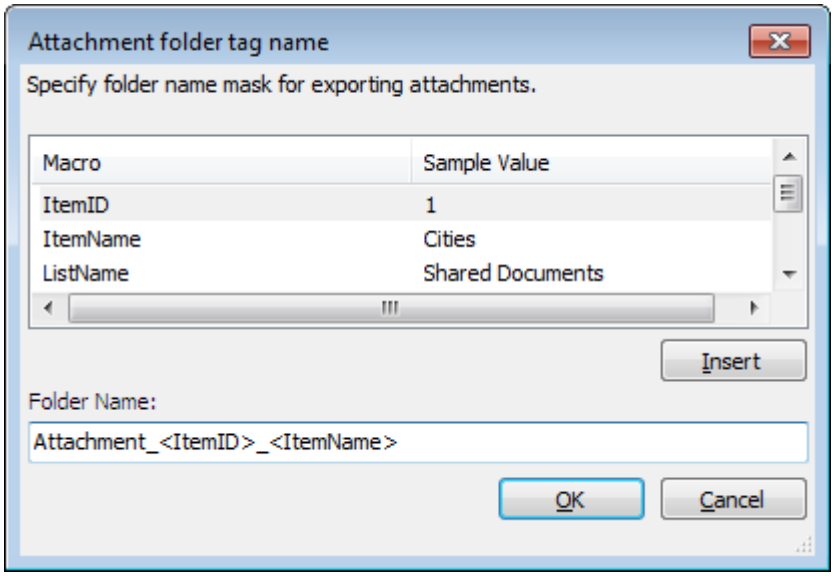
c) **Do you want to create destination folder path if it does not exist? -** This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) **Do you want to create the folder underneath, when its contents are empty? -** This option creates the folder in the destination location, if the source folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

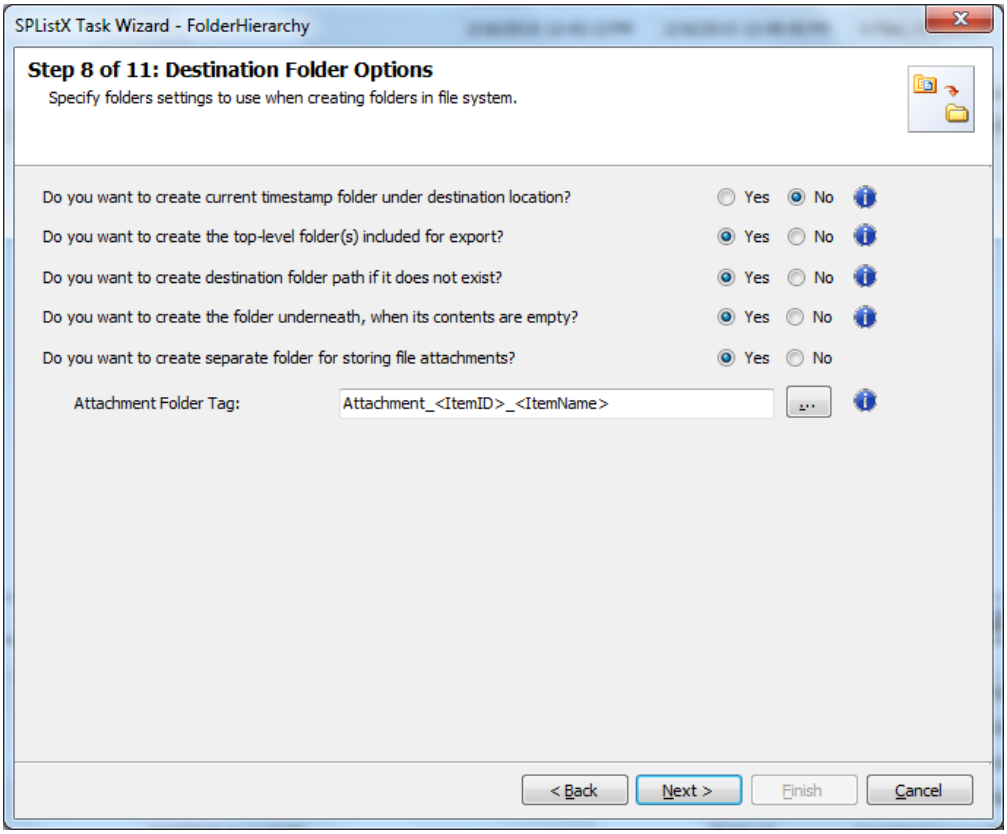
e) **Do you want to create separate folder for storing file attachments? -** This option creates separate folder for storing file attachments under the specified destination location by selecting the option (yes/No).

3) You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.


SPListX Task Wizard - FolderHierarchy
Step 8 of 11: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
...
< Back
Next >
Finish
Cancel

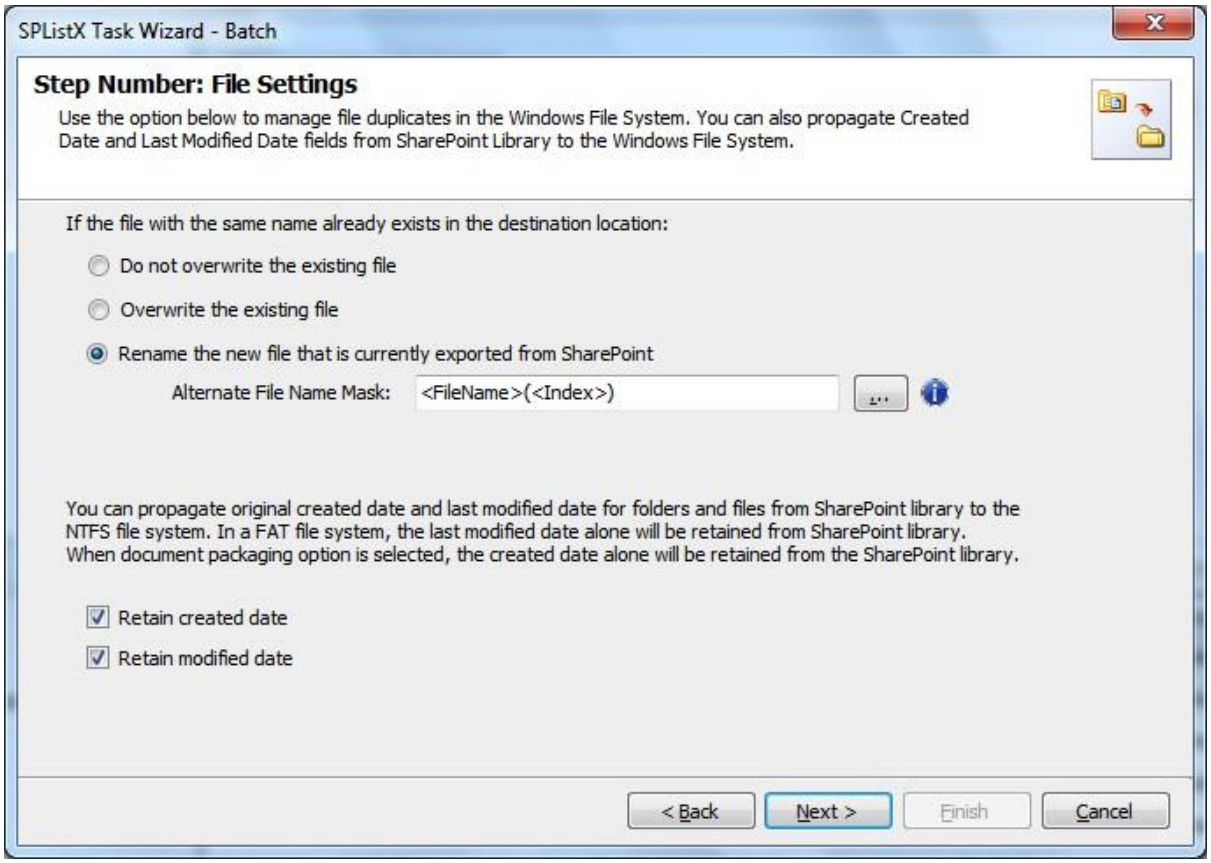
4) Click **Next** to Proceed.

4.1.10 File Settings

To construct Alternate File Mask and to propagate created Date and Modified Date from SharePoint Library to Windows File System, use below options:

1) Alternate File Name Mask

If the file with the same name already exists in the destination location, follow the steps outlined below:

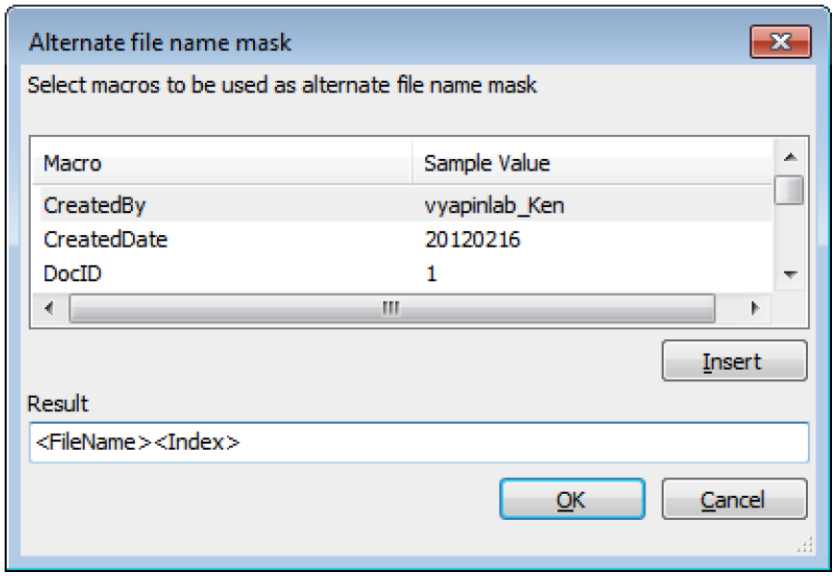

SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

a) Do not overwrite the existing file - Skips the file without overwriting the existing file with the same name.

b) Overwrite the existing file - Deletes the file from the destination location and exports the current source file.

c) Rename the new file that is currently exported from SharePoint - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

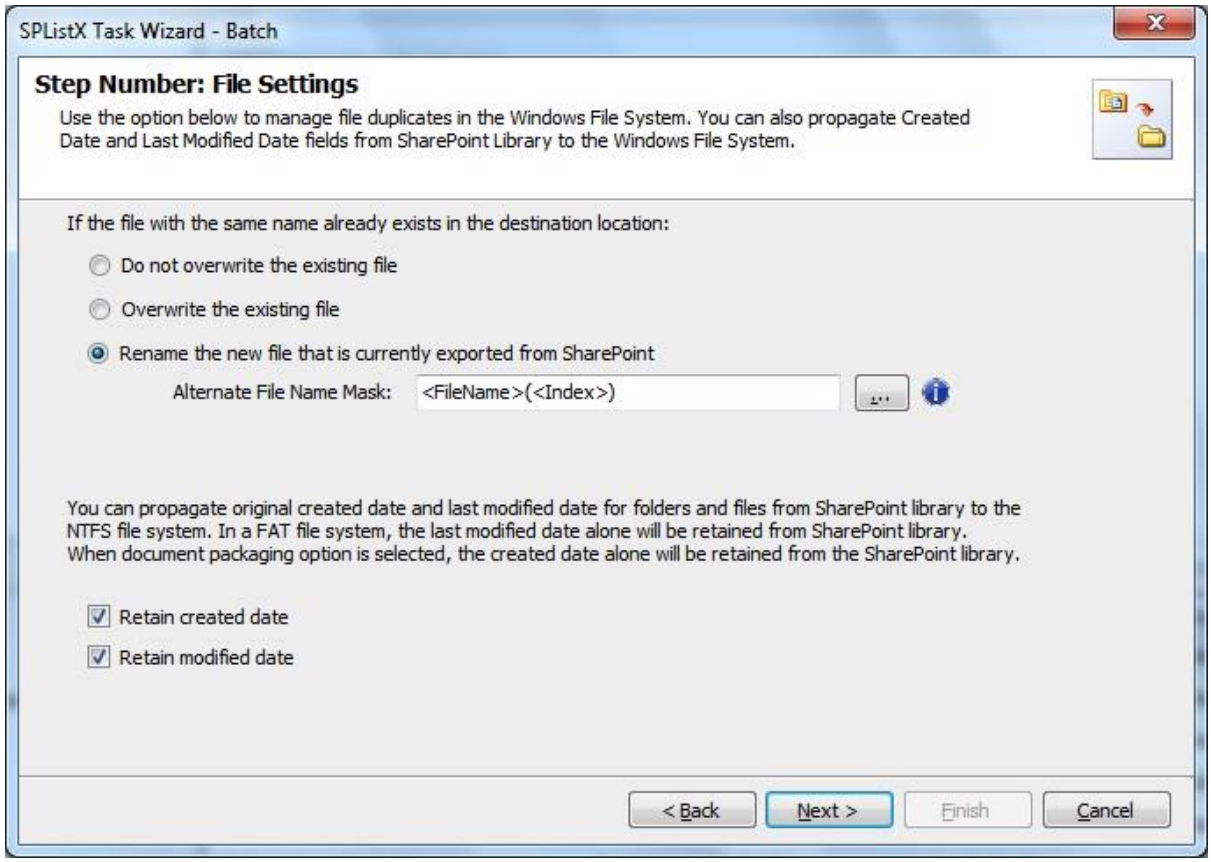
To select alternate file naming mask, click the **alternate file name mask** *button* placed next to the **alternate file name mask** *textbox*. **Alternate file name mask** *dialog* appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. Click **OK** to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:


SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
...
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

a) **Retain created date -** Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.

b) **Retain modified date -** Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

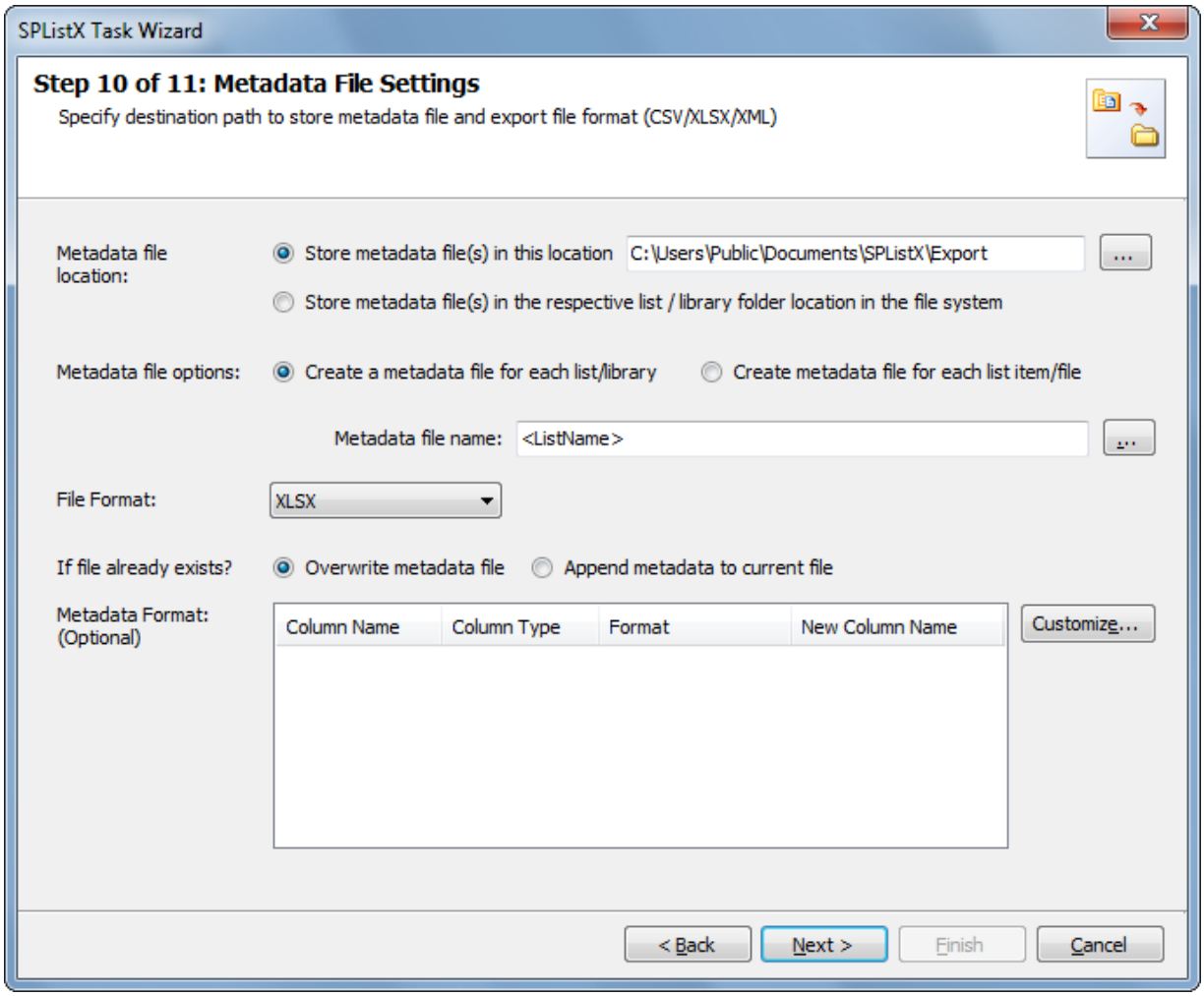
NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

3) Click **Next** to Proceed.

4.1.11 Metadata File Settings

SPListX will create metadata files based on the following options given below:

1) **The Metadata File Settings** step appears as shown below:


SPListX Task Wizard
Step 10 of 11: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)
Metadata file location:
Store metadata file(s) in this location
C:\Users\Public\Documents\SPListX\Export
Store metadata file(s) in the respective list / library folder location in the file system
Metadata file options:
Create a metadata file for each list/library
Create metadata file for each list item/file
Metadata file name:
<ListName>
File Format:
XLSX
If file already exists?
Overwrite metadata file
Append metadata to current file
Metadata Format: (Optional)
Column Name
Column Type
Format
New Column Name
Customize...
< Back
Next >
Finish
Cancel

2) Specify the **Metadata filename & location** using the options below:

   a) Store metadata file(s) in this location: Specify a folder path where the selected list items metadata are to be exported. You can also Click **browse ('...')** button to launch folder browser dialog.

   b) Store metadata file(s) in the respective list / library folder location in the file system: - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

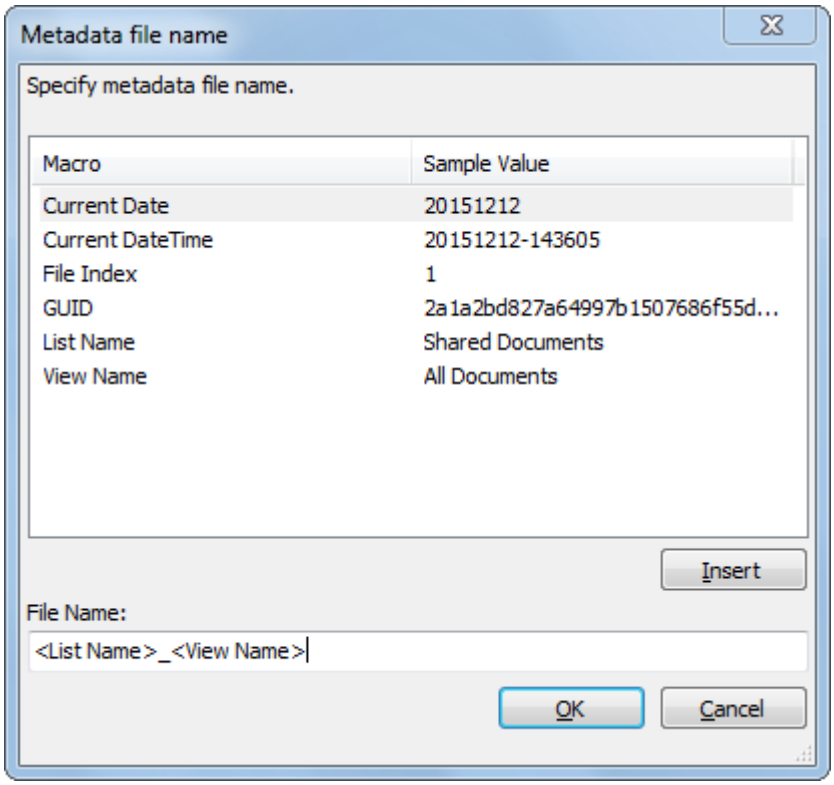
NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

3) Specify the Metadata file options using the options below:

c) **Create a metadata file for each list/library:** This option will export the metadata for the entire list/library in a single file.
d) **Create metadata file for each list item/file:** This option will export separate metadata file for each list item or file.

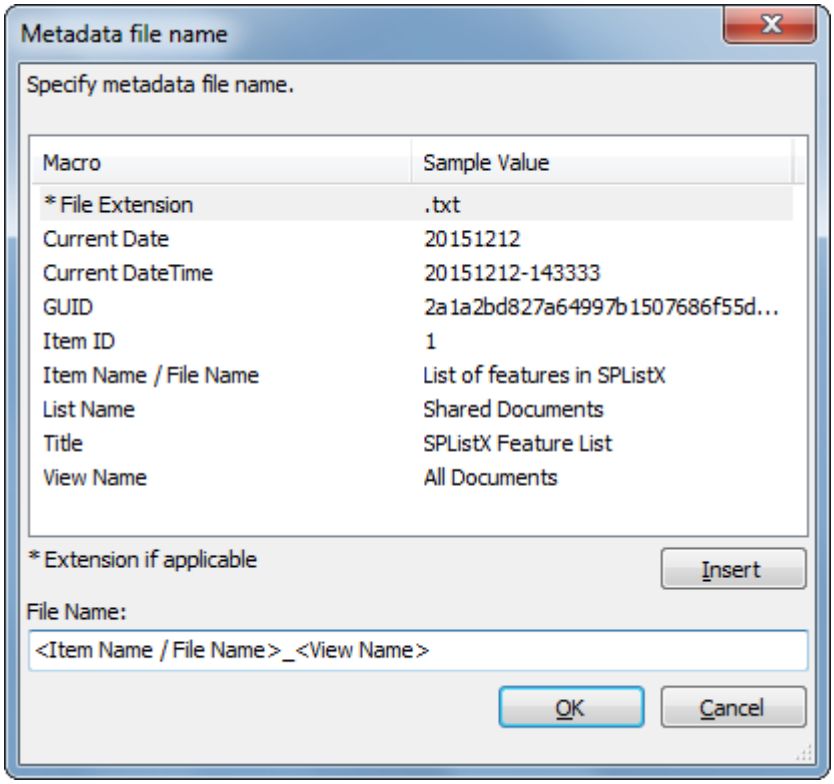
4) When you select **Create a metadata file for each list/library option**, SPListX creates the metadata file using the List name.

To create a unique metadata file name, click the (...) button placed next to the metadata file name textbox. Metadata file name dialog appears as shown below:



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

5) When you select **Create metadata file for each list item/file option**, SPListX creates the metadata file using the Item name.



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

*** Note: ViewName** macro is applicable only for View based export. SPListX will substitute the name of the processed view wherever applicable.

In view based export,

For list / library entries and for files / folders within them, it appends the view name.

For file / folder entries provided for export, it appends "All Items" instead of the view name.

e.g., List of features in SPListX_All Items.xlsx

6) Specify the Metadata file format using the options below:

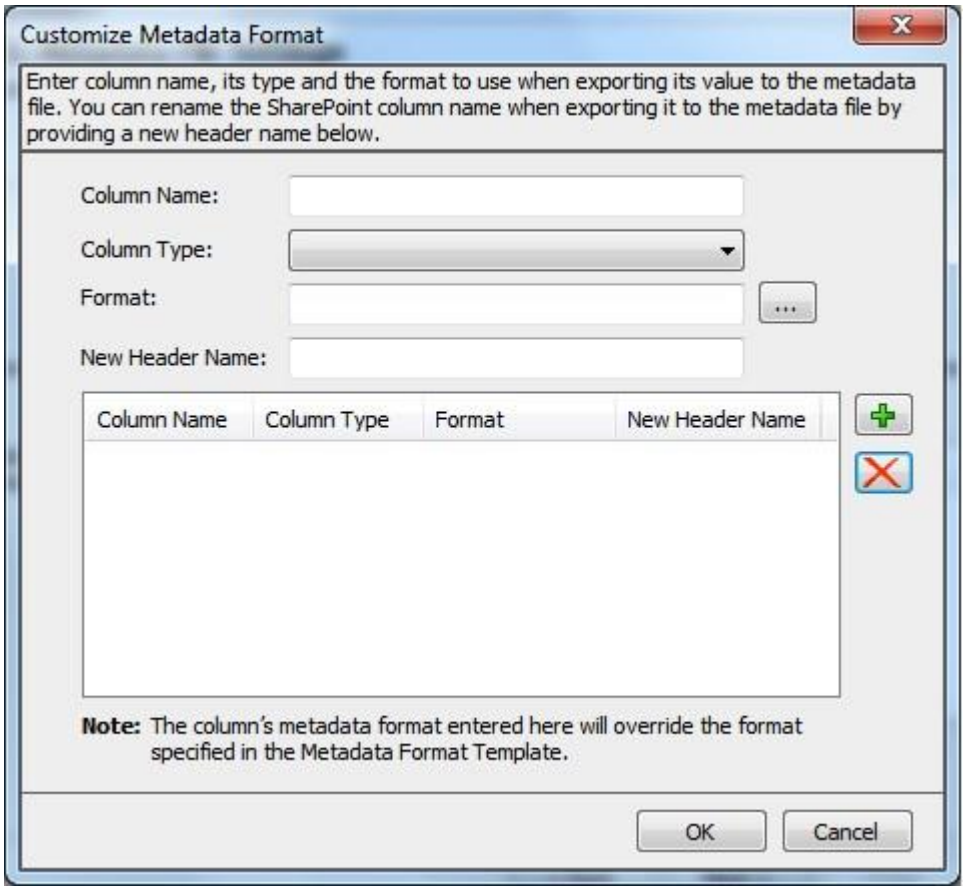
a. **CSV**
b. **XSLX**
c. **XML***
d. **XML with DTD***

7) If the metadata file already exists in the destination location, choose from any one of the following options:

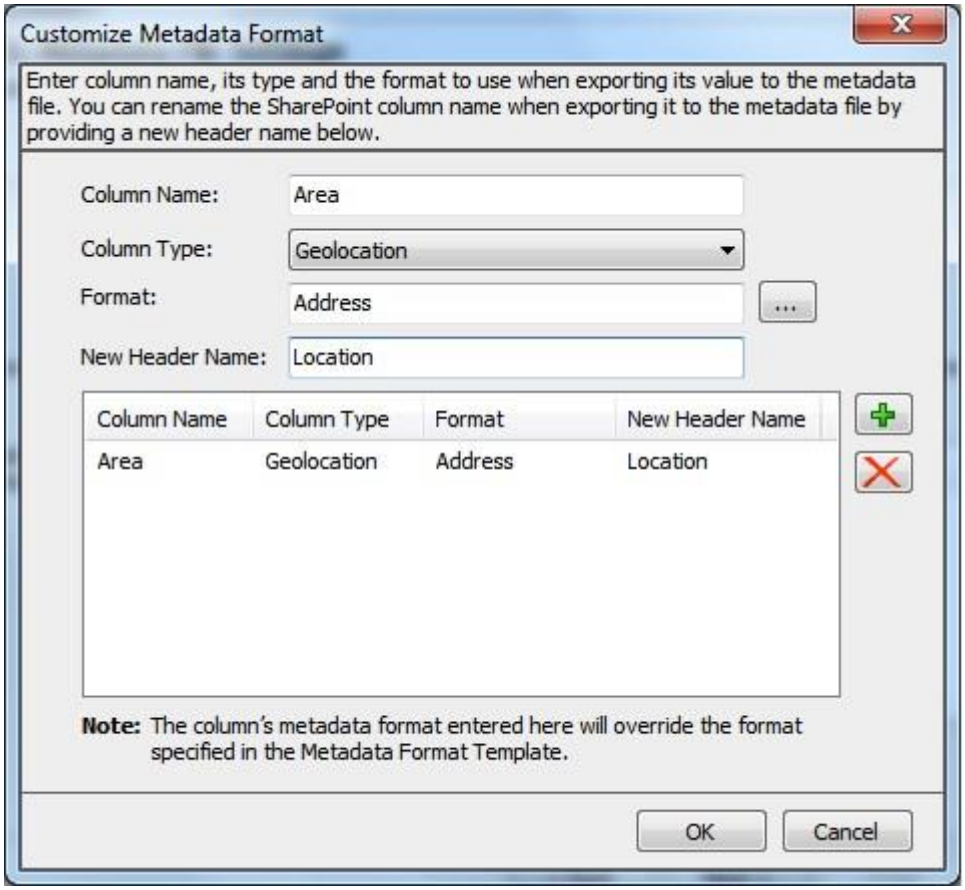
a) **Overwrite:** This option will overwrite the existing metadata file.
b) **Append:** This option will append the new metadata to the existing metadata file. The new metadata will be shown in the new sheet with the name of current timestamp in XLSX file.

8) You can specify a new metadata custom format based on the column name when generating the metadata file. The format specified here overrides the application

level template defined in **Metadata Format Template** tool. Also, you can specify new column names to use when generating the metadata file in the file system location. To use this feature, click the Edit button. A **Customize Metadata Format** Dialog appears as shown below:


Customize Metadata Format
Enter column name, its type and the format to use when exporting its value to the metadata file. You can rename the SharePoint column name when exporting it to the metadata file by providing a new header name below.
Column Name:
Column Type:
Format:
...
New Header Name:
Column Name
Column Type
Format
New Header Name
Note: The column's metadata format entered here will override the format specified in the Metadata Format Template.
OK
Cancel

9) Specify SharePoint column name in the **Column Name** textbox and select its type from the available **Column Type** from combo box. **Click** ... button to load the available macros. Select format from the available macros. If you want to rename the SharePoint column name when exporting to the metadata file, provide a new name in the **New Header Name** text box. For example, a SharePoint column named 'Area' in the source SharePoint list can be customized and renamed as 'Location' when creating the metadata file during the export operation.



Click to add the SharePoint column name and its format in the custom metadata format list.

Click to remove t he SharePoint column name from the custom metadata format list.

10) Click ***Next*** to Proceed.

*** Note:**

XML File Format:

SPListX generates an XML file using the filename (using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name) in the stated metadata file location with the metadata information.

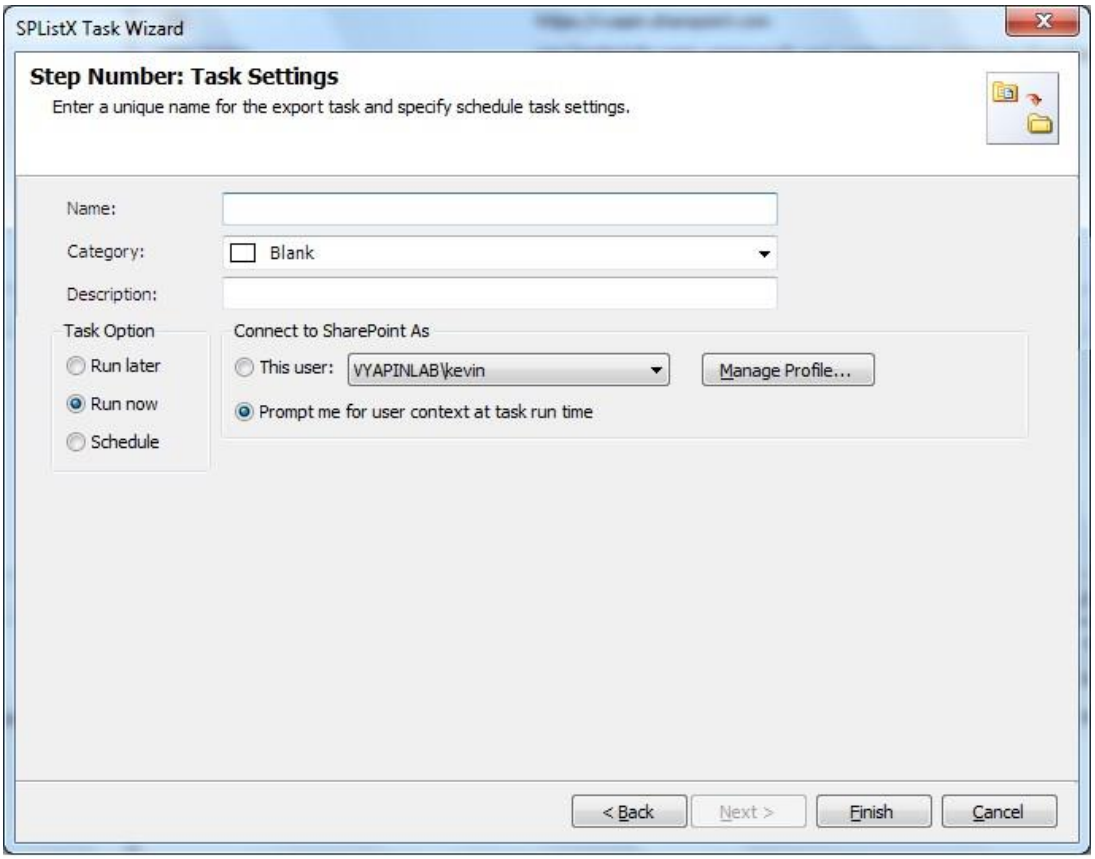
XML with DTD

SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput. XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

4.1.12 Task Settings

To specify the task name and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) The **Task Settings** step appears as shown below:



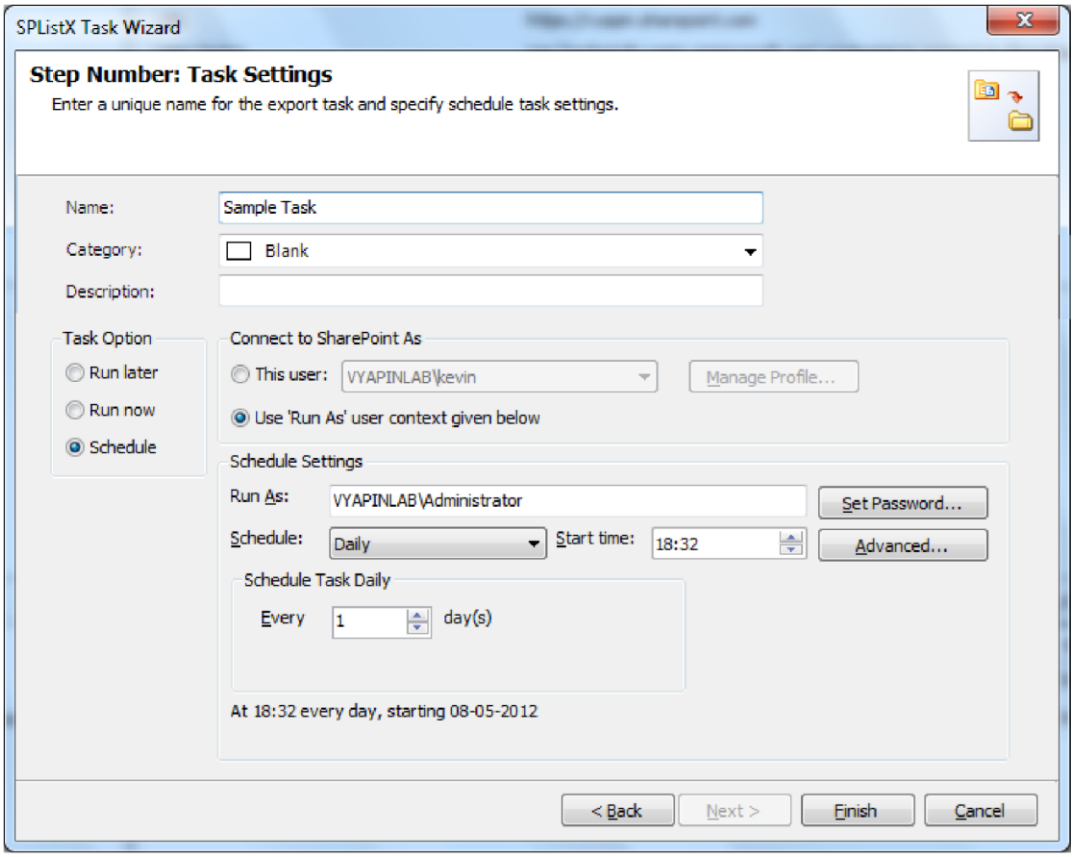
2) Enter a unique task name in **Task Name** textbox.

3) Select a **Category** from the Drop-Down List in which the task should be categorized & stored.

4) Enter a **Description** for the export task.

5) Select a **Task Option** from one of the following options:

- **a) Run later -** to run the task later as and when desired
- **b) Run now** - to run the task immediately after clicking **Finish** button
- **c) Schedule -** to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the Run As user account specified in this export wizard step. The Run As account should be a valid Windows domain account.



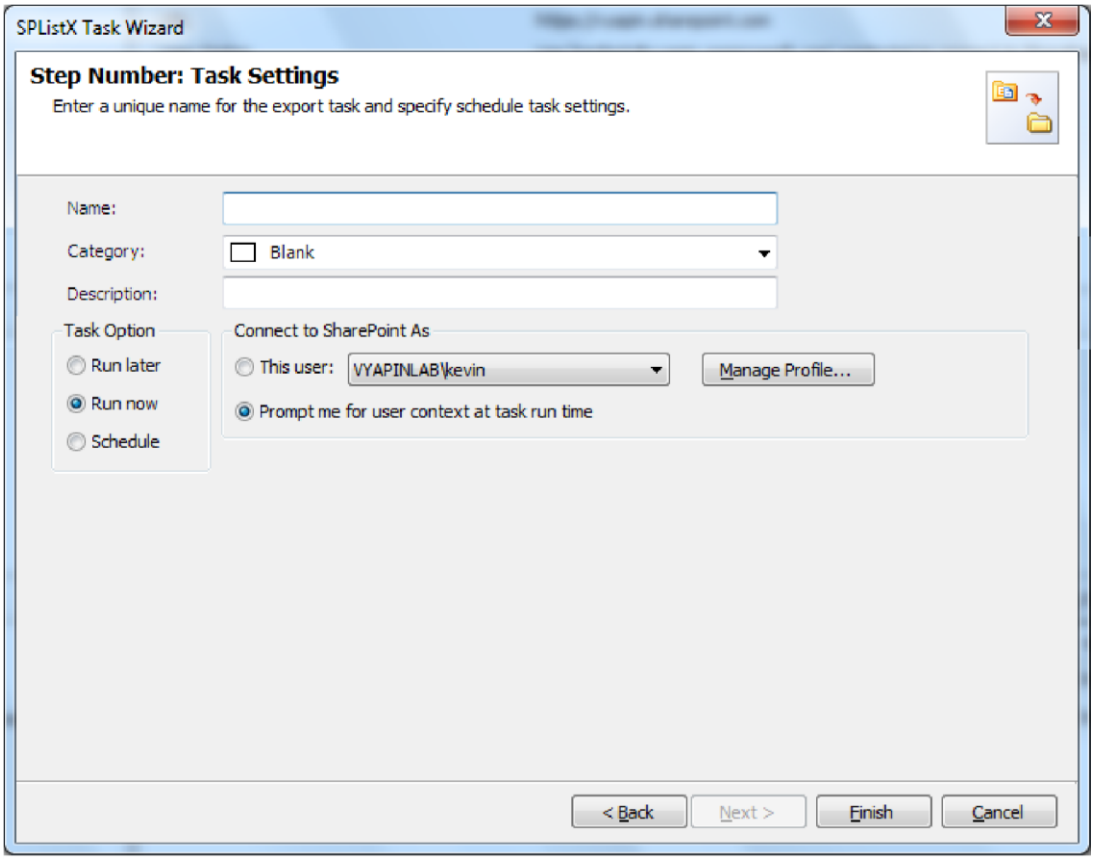
In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

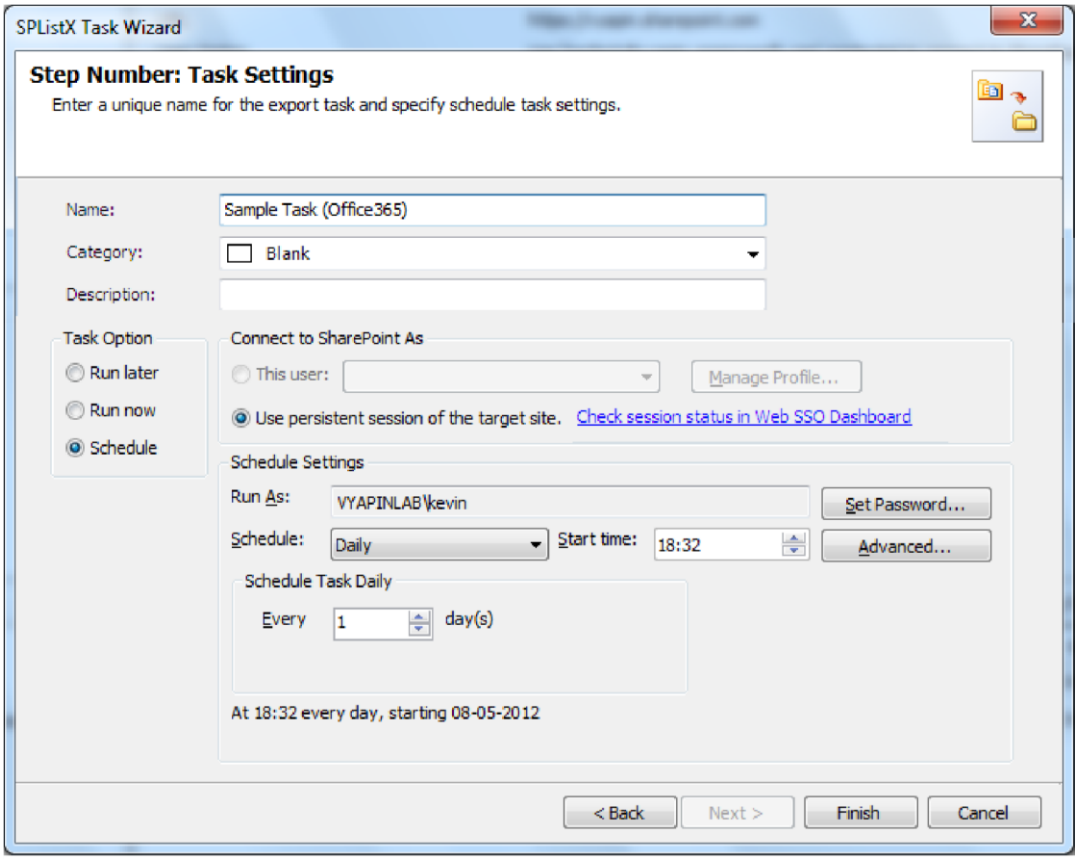
Click **Manage Profile** button to create new user profile.

6) As for Web Single Sign-on credential based export task, the task settings will be shown as below:

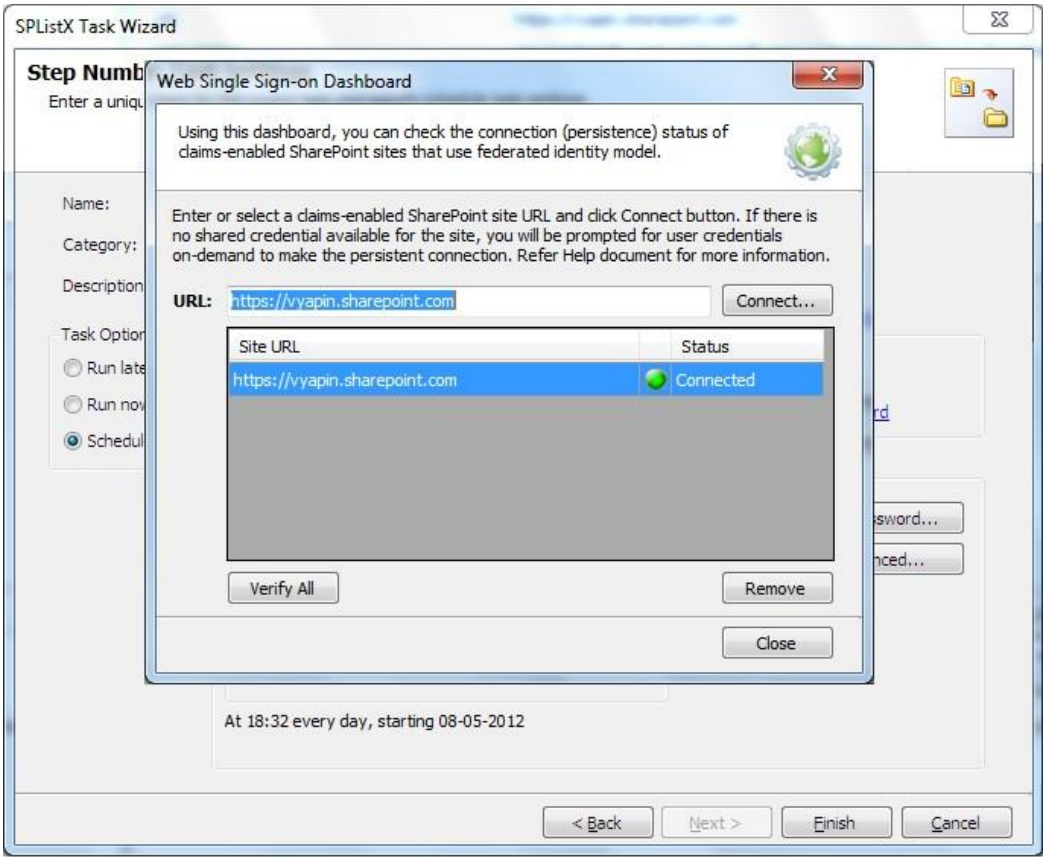


The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

7) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:



8) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, click **Check session status in Web SSO Dashboard** hyperlink.



8) Click **Finish** button to create the task.

5 Export SharePoint List contents using the search option

Create Task

- Create Search Batch Descriptor File
- SharePoint User Credentials
- Search URL Settings
- Search Conditions
- Column Settings Options
- Version Options
- Permission Options
- Export Conditions
- Document Packaging Options
- Destination Folder Options
- File Settings
- Metadata File Settings
- Task Settings

Working with SharePoint Search Results

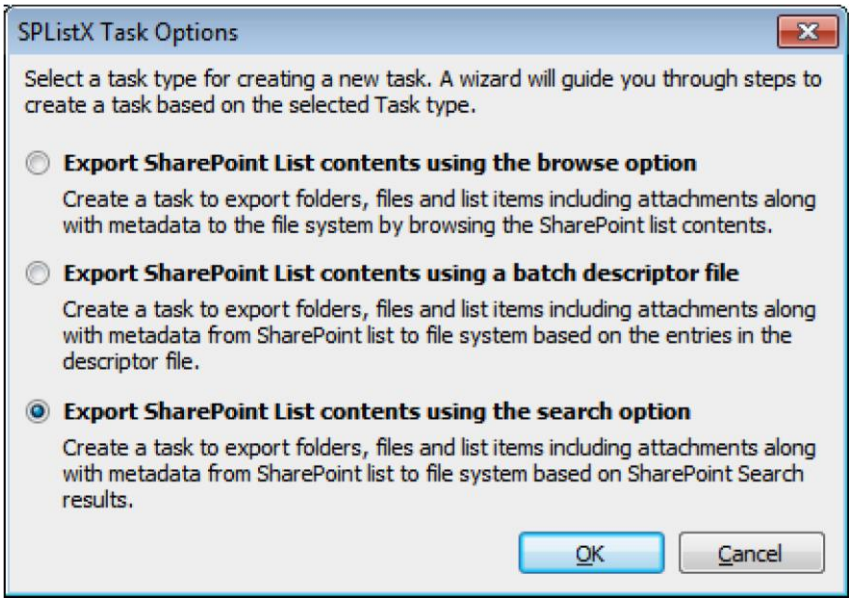
- SharePoint 2013 Search Results
- SharePoint 2010 Search Results
- SharePoint 2007 Search Results

How to create Batch File using Search Results

5.1 Create Task

To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

1) **Select Export SharePoint List contents using the search option** in **SPListX Task Options** dialog as shown below and click **OK.**


SPListX Task Options
Select a task type for creating a new task. A wizard will guide you through steps to create a task based on the selected Task type.
Export SharePoint List contents using the browse option
Create a task to export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
Export SharePoint List contents using a batch descriptor file
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
Export SharePoint List contents using the search option
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint Search results.
OK
Cancel

2) The **SPListX Task Wizard** appears as shown below:

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

3) Click **Next** button

4) Specify **SharePoint User Credential**

5) Specify **SharePoint URL Settings**

6) Specify **Search Conditions**

7) Specify **Column Settings Options**

8) Specify **Version Options**

9) Specify **Permission Options**

10) Specify **Export Conditions**

11) Specify **Document Packing Options**

12) Add **Destination folder option**

13) Specify **File Settings**

14) Specify **Metadata File Settings**

15) Specify **Task Settings**

16) Click **Finish** button to create the task, or click **Back** button to change the task settings.

5.1.1 Create Search Batch Descriptor File

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using the search option** task type.

1) The first row of the metadata file should contain the Field Names as headers.

2) The first field should be named as **'Path'** and second field should be named as **'Destination Path'.**

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key: (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSV Delimited
; (semi-colon)	Delimited (;)
*** (asterisk)**	Delimited(*)

3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., http://vyapin/Shared Documents) or sub-folder URL within SharePoint List (e.g., http://vyapin/Shared Documents/sample folder1) or file URL within the SharePoint List (e.g., http://vyapin/shared documents/sample folder1/SampleDocument.doc) or list item URL within the SharePoint List (e.g., http://vyapin/lists/cities/1_.000)

4) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.

5) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name).

6) For **CSV** and **TXT** formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "http://vyapin/Shared Documents/sample folder1". When using accent characters such as [á é í ó] in folder / file names, the **CSV / TXT** metadata file must be in UNICODE encoded format.

7) For Microsoft Excel file formats **(XLSX),** you do not have to enclose the field names and their corresponding values within double quotes.

Sample format of a CSV / TEXT batch descriptor file:

NOTE: Refer Point #2 for the separator to be used in the batch descriptor file

"Path", "Destination Path"

"http://vyapin/shared documents/Sample Brochure.doc", "C:\My Documents"

"http://vyapin/shared documents/sample folder1/*", "\\vyapinfs\ExportDocs\shared doc contents"

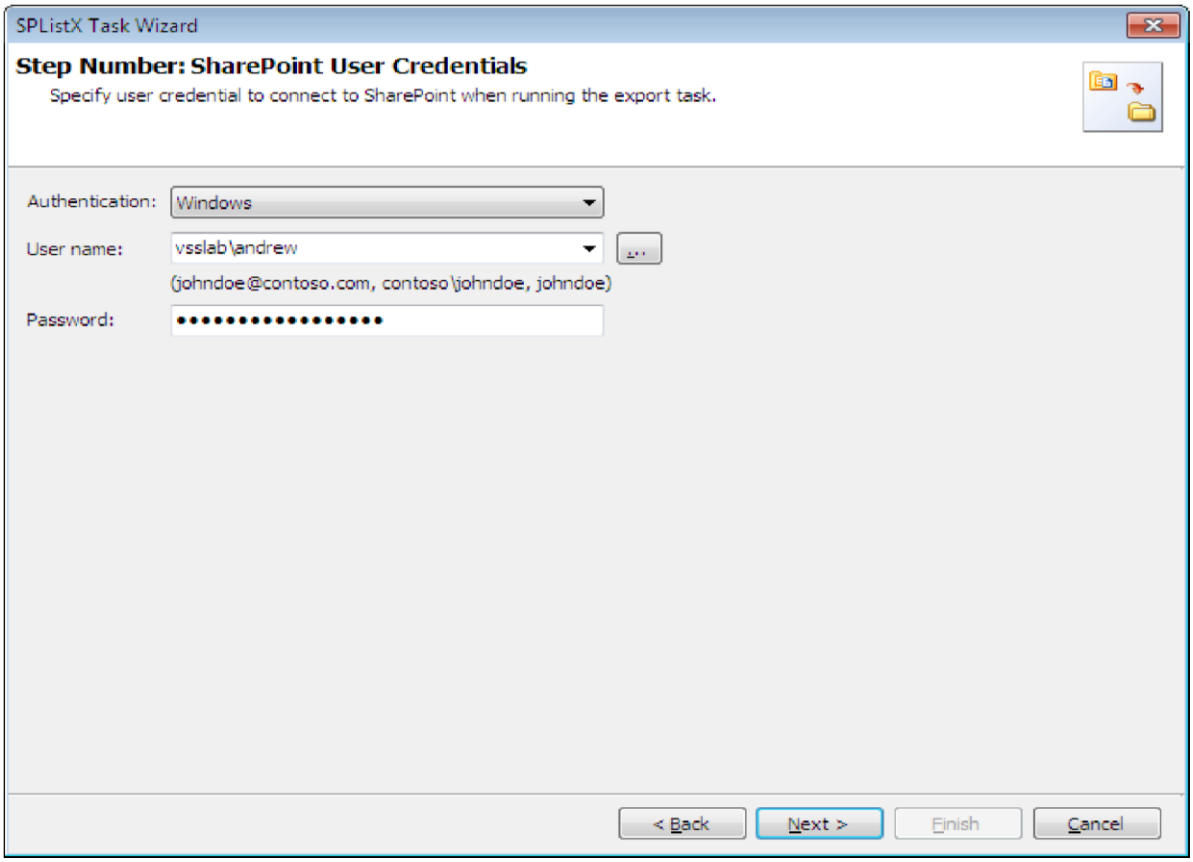
"http://vyapin/lists/*.*", "C:\My Sales\Lists Backup"

"http"//vyapin/lists/cities/.*","C:\My Cities\Backup

5.1.2 SharePoint User Credential

Specify the user credential to connect to the SharePoint.

1) The **SharePoint User Credential** step appears as shown below:

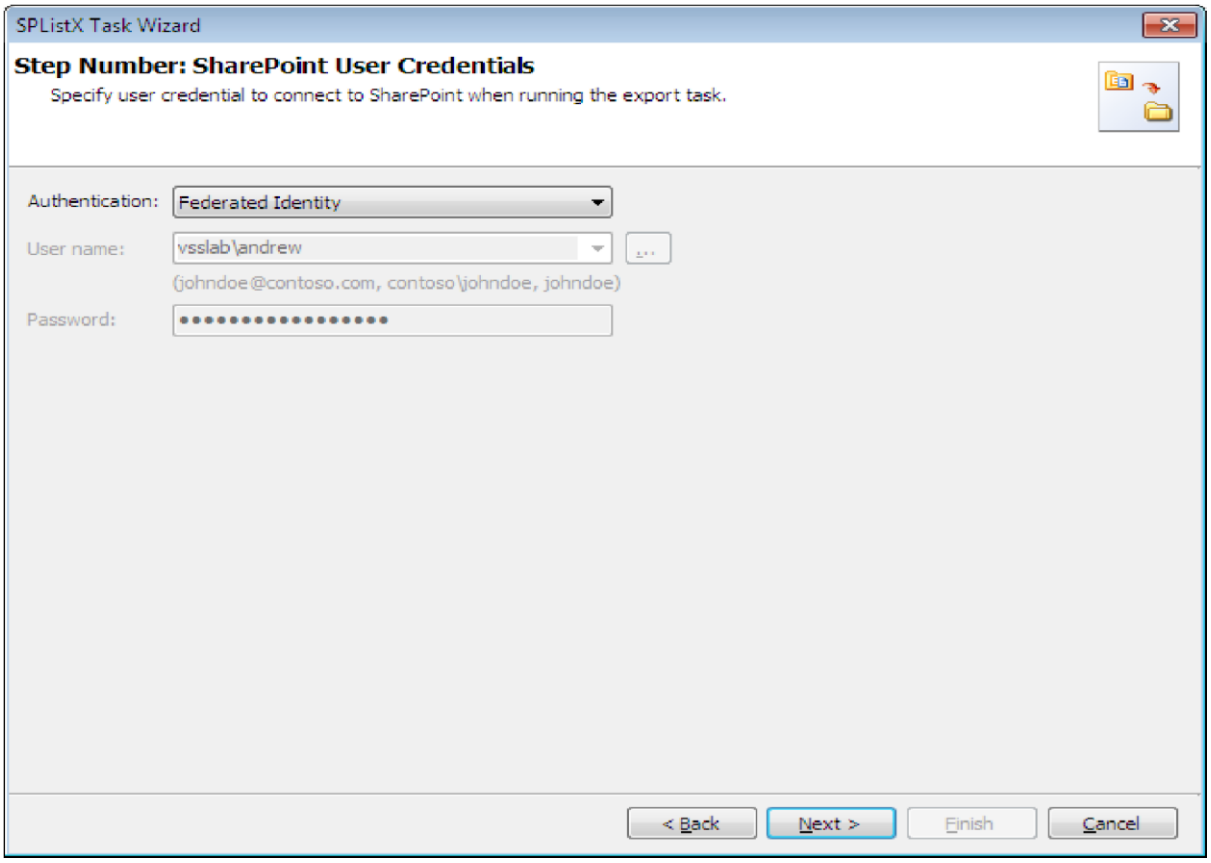


2) Specify the Authentication mechanism and credentials to connect to SharePoint using one of the options described below:

a) Windows or Forms – SPListX will initiate Windows or Forms authentication using the user account information stored in the user profile or the one entered in the textbox.

b) Office 365 Cloud Identity – Connects to a SharePoint Online site in Office 365 using the given cloud identity i.e., Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com.

c) Federated Identity – Connects to a SharePoint site (On-premise or SharePoint Online) using the federated identity account configured using ADFS. Select this option to connect to Office 365 SharePoint Online sites that are configured using federated identity provider.

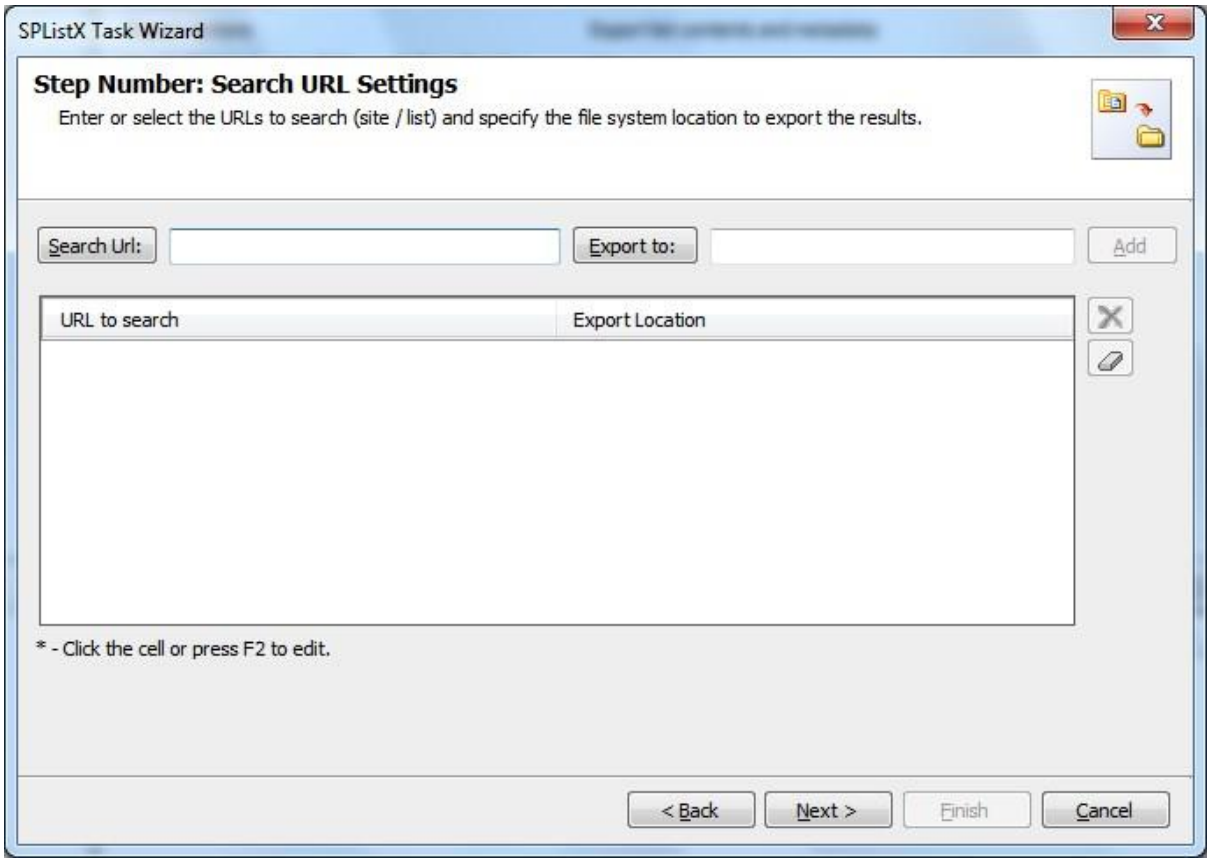


3) Click **Next** to Proceed.

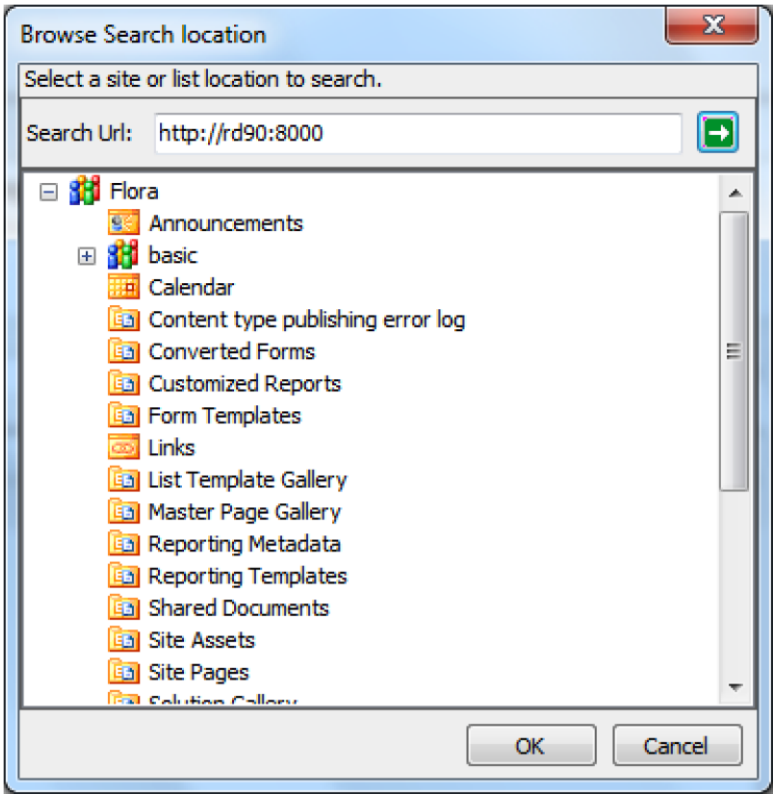
5.1.3 Search URL Settings

You can specify the URLs to search using a batch file or select the URL using the browse button. The URLs to search narrow down the search results. For each searched URL, you can export to a different export location, if necessary.

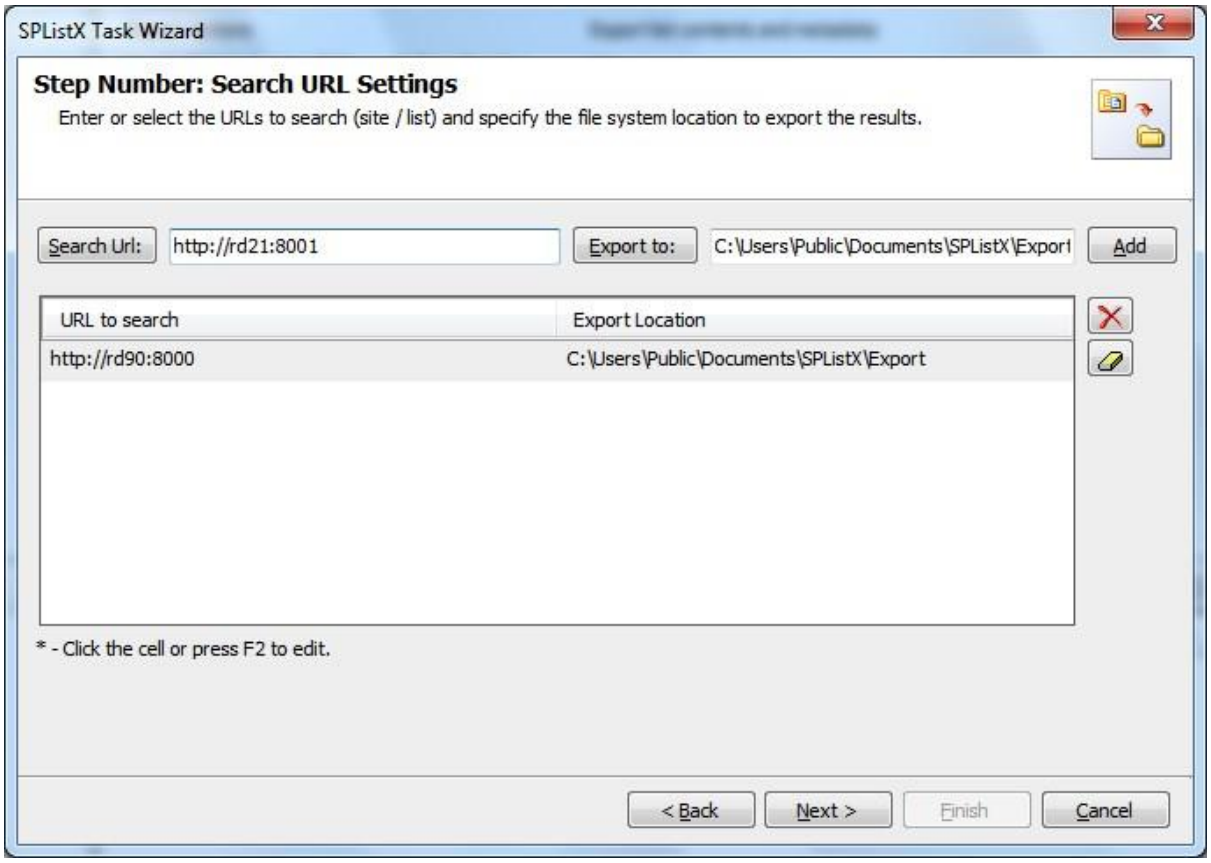
1) The **Search URL Settings** step appears as shown below:


SPListX Task Wizard
Step Number: Search URL Settings
Enter or select the URLs to search (site / list) and specify the file system location to export the results.
Search Url:
Export to:
Add
URL to search
Export Location
* - Click the cell or press F2 to edit.
< Back
Next >
Finish
Cancel

2) Enter or browse the URLs to search in the Search Url textbox. Click Search Url button to browse a SharePoint location. Specify a valid SharePoint URL in the URL textbox and Click Go button. SPListX will load the tree view of the source location as show below. Select a Site or List Url from the tree view and click OK.



3) Specify a valid file system location to export the search results and then click **ADD** button to add the items to the search list.

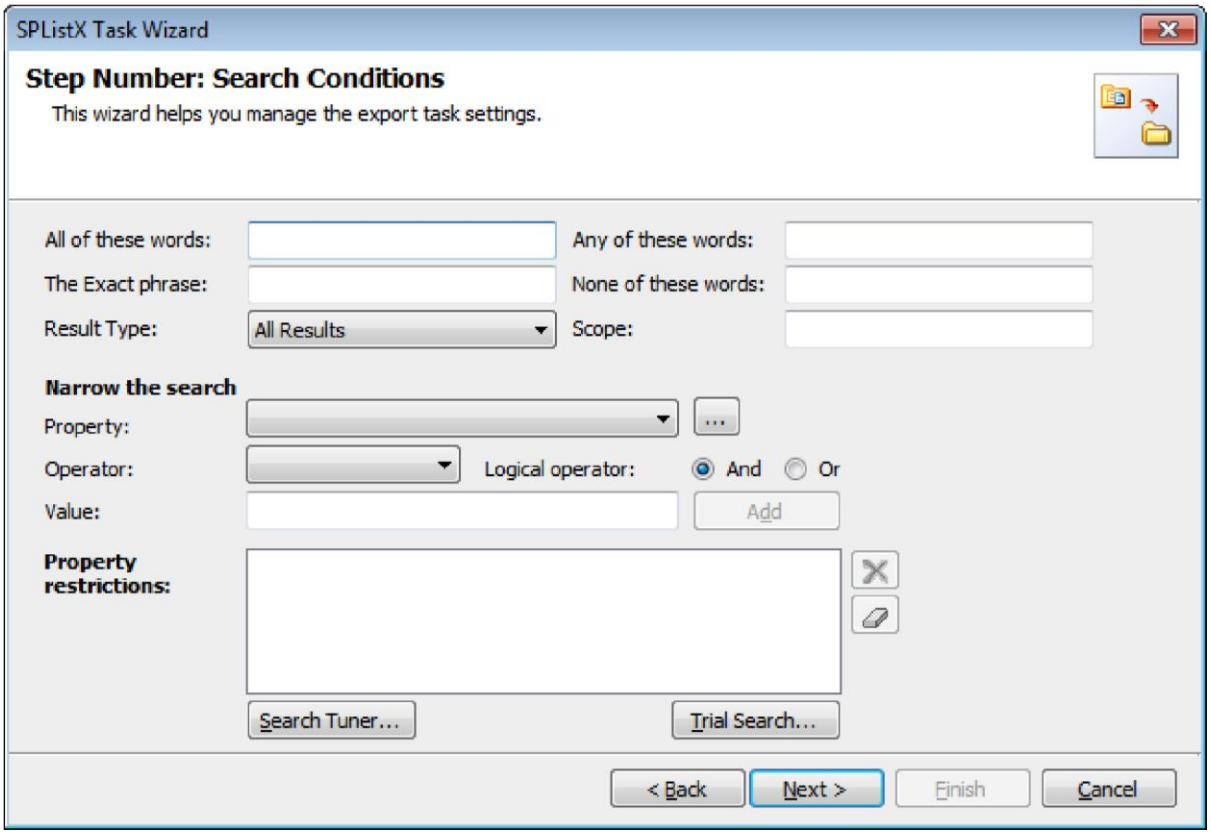


4) Click **Next** to Proceed.

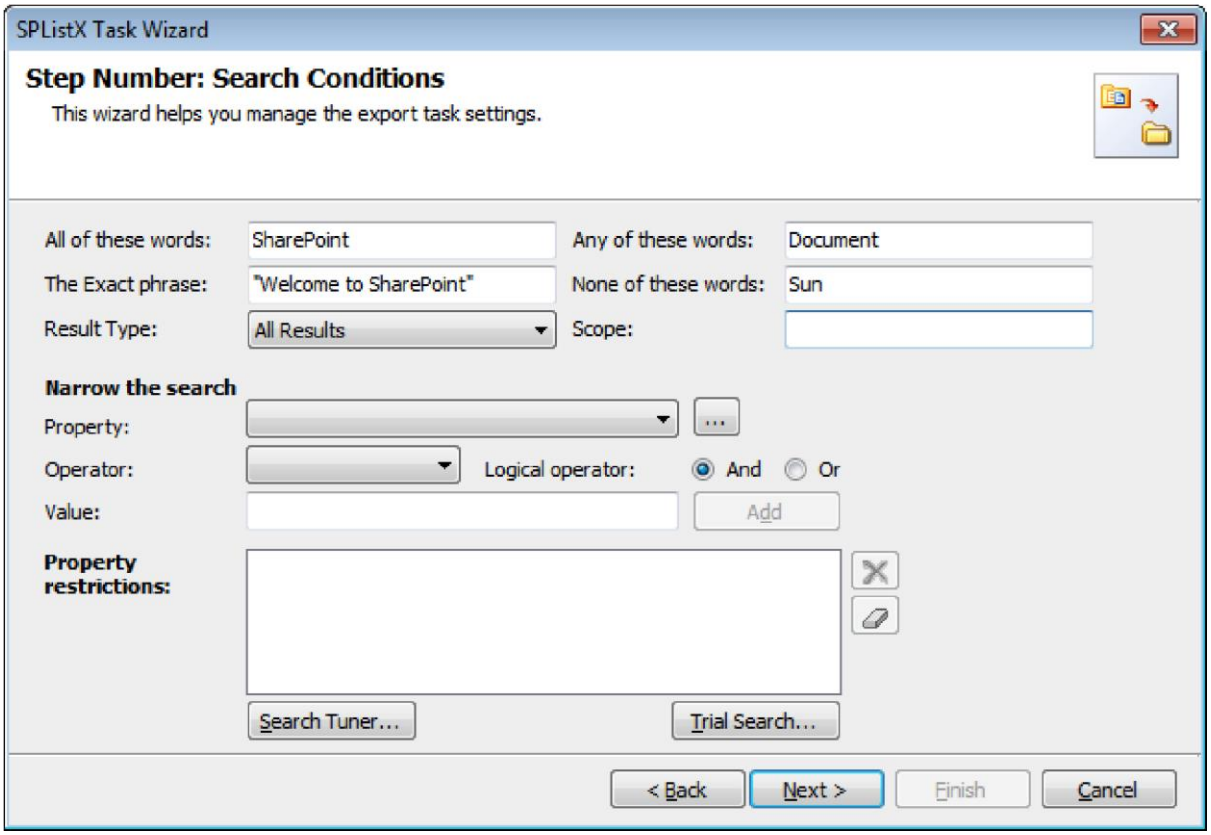
5.1.4 Search Conditions

SPListX will search for list items in SharePoint list based on search conditions. The conditions can be created using SharePoint Managed properties.

1) The **Search Conditions** step appears as shown below:



2) Define search keywords in appropriate textboxes to search for the content indexed at Farm level. For example, search for the keyword "SharePoint" in "The Exact Phrase text box"

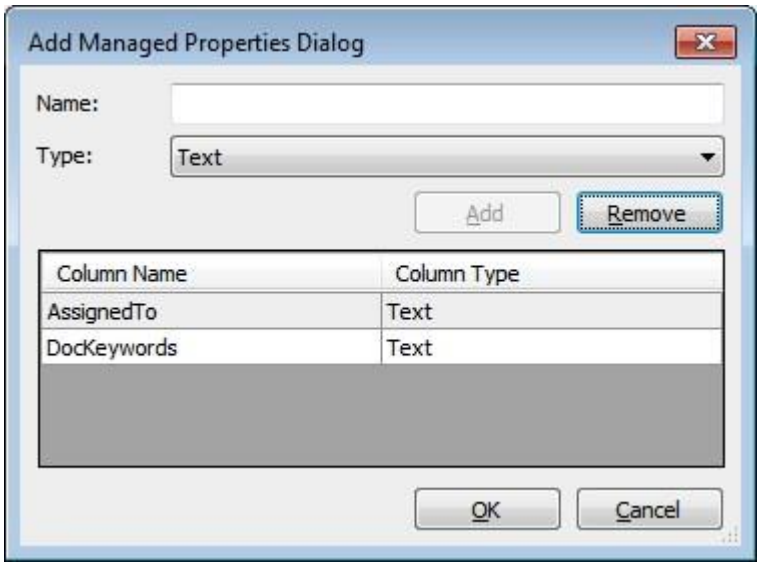


Result Type - Result Type will narrow down the search results. By default, SPListX will search for all list items of all list types. For ex, if you want to narrow down your search results only for documents, select "All Documents" type in result type.

Scope - Scopes will narrow down the search results returned to search query. It can be either shared (Farm level) or locally defined (Site level). Scopes can be defined by specifying different rules using custom metadata on content source.

Note: Enable Advanced Search in SharePoint to avail this feature.

3) Click **(...)** button to add the SharePoint managed properties in properties dropdown. The Add Managed Properties Dialog as shown below:



Specify the managed property name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Before adding managed properties, Please ensure the followings:

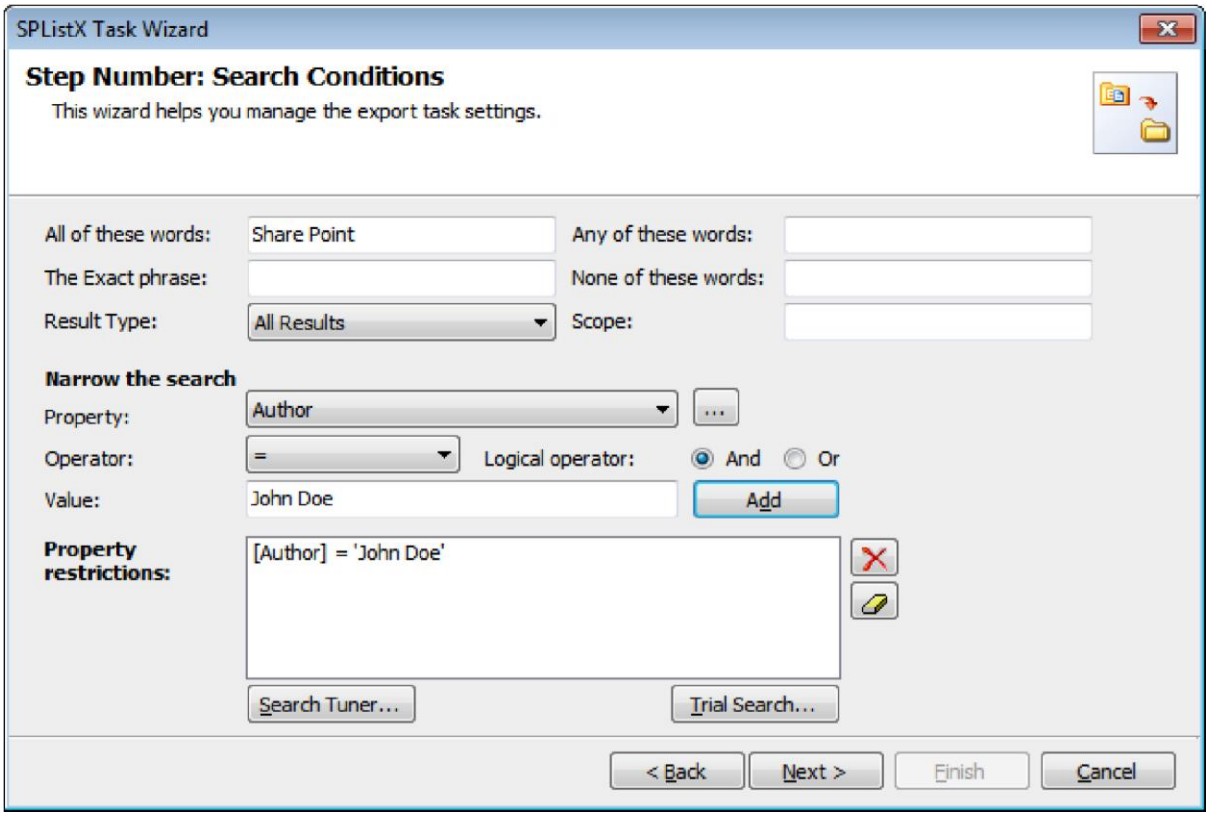
i) Specified managed property exists in Shared Services Provider.

ii) Data type matches exactly.

Click **Add** button to add the managed property to the property drop-down.

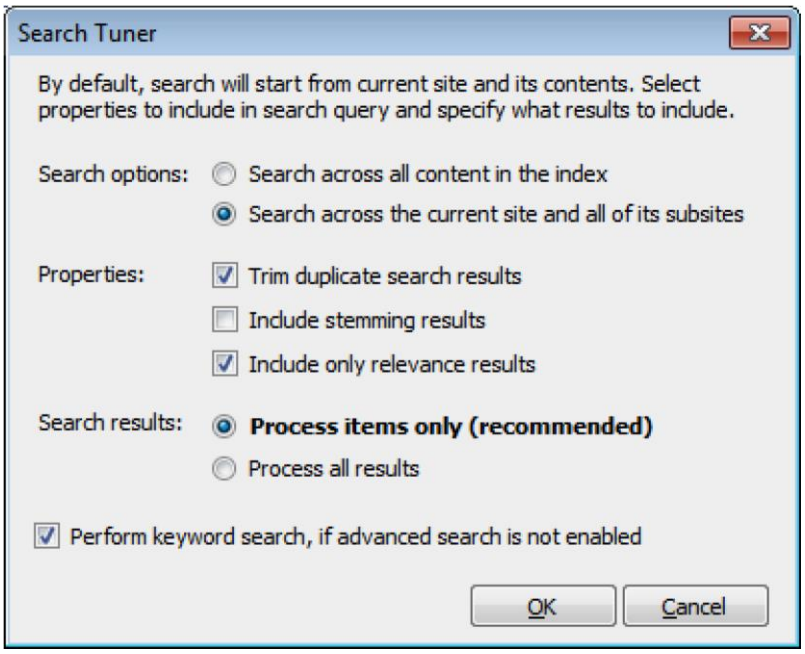
Click **Remove** button to remove the columns from the property drop-down.

You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed by using logical operator '**AND**' or '**OR**'.



5) You can fine tune the search results by clicking **Search Tuner** button.

The **Search Tuner** dialog appears as shown below:


Search Tuner
By default, search will start from current site and its contents. Select properties to include in search query and specify what results to include.
Search options:
Search across all content in the index
Search across the current site and all of its subsites
Properties:
Trim duplicate search results
Include stemming results
Include only relevance results
Search results:
Process items only (recommended)
Process all results
Perform keyword search, if advanced search is not enabled
OK
Cancel

a) Search Options:

Search across all content in the index - SPListX will search for list items content, properties across all the content indexed at farm level.

Search across the current site and all of its sub-site - By default, SPListX will search for list items contents and properties at current site and underneath.

Current site indicates that site URL specified.

b) Properties:

Trim duplicate search results - This option will remove the duplicate item Urls from search results.

Include stemming results - This option will not include the stemming results. If you enable stemming, search results will bring back words related to search keywords.

For ex: If you search for keyword "run". Search results will bring back words matches like "runs", "running".

Include only relevance results - This option will include only relevance results in search results. Relevance will bring the search results closely related to the search query.

c) Search results:

Process only items (recommended) - This option will search for list items only.

Process all results - This option will include all list view URLs, site URLs in search results. But, export process engine will ignore the site URLs, List view URLs for export.

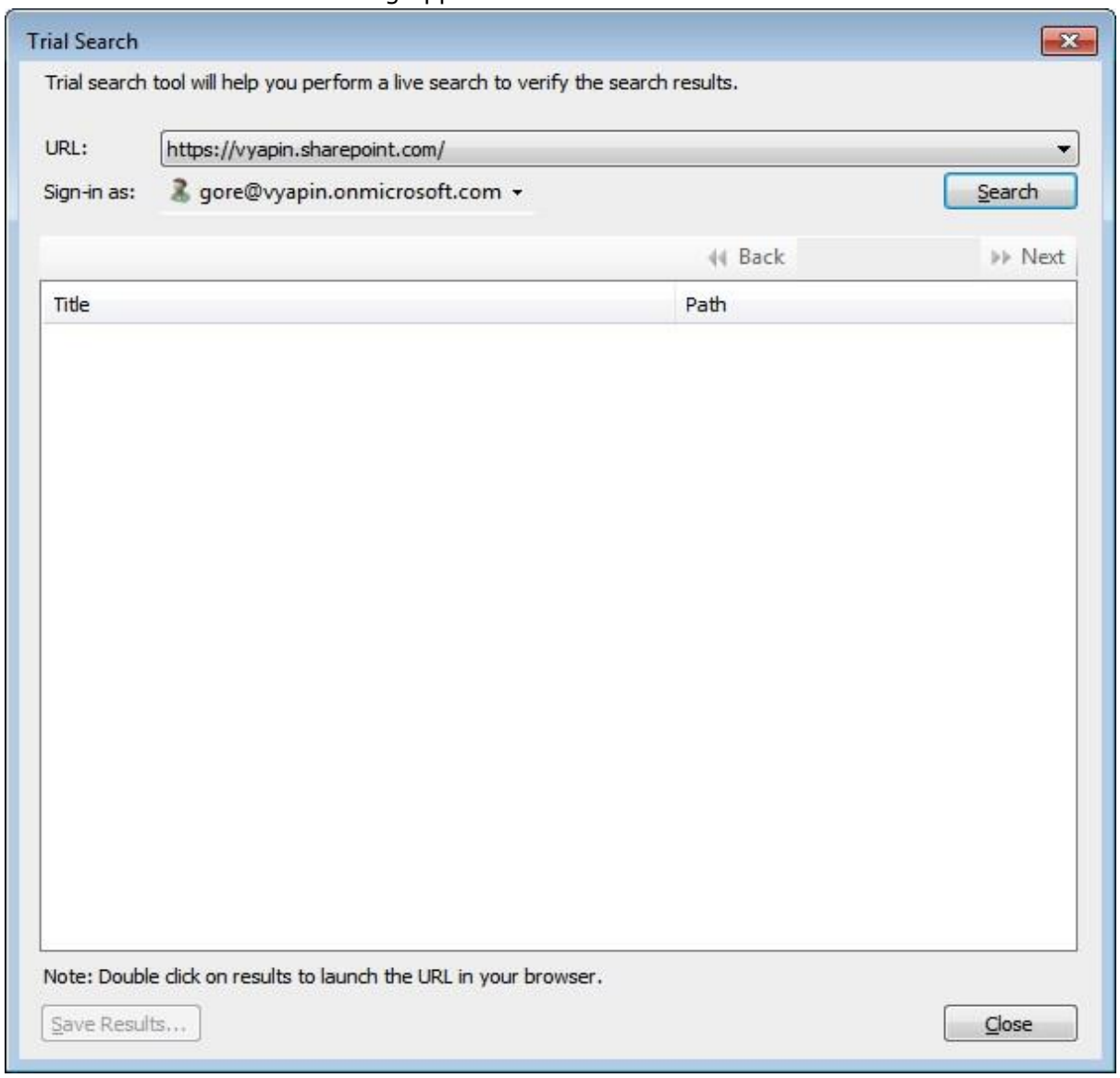
d) Perform keyword search, if advanced search is not enabled

In WSS 3.0, advanced search is not enabled. If you want to perform search for the WSS 3.0 sites. SPListX will ignore all the **properties, scopes and result types specified in search query**. Keyword search query is framed based on the keywords specified in All Keywords textbox, Any Keywords textbox, Exact Phrase textbox.

Click **OK** to proceed.

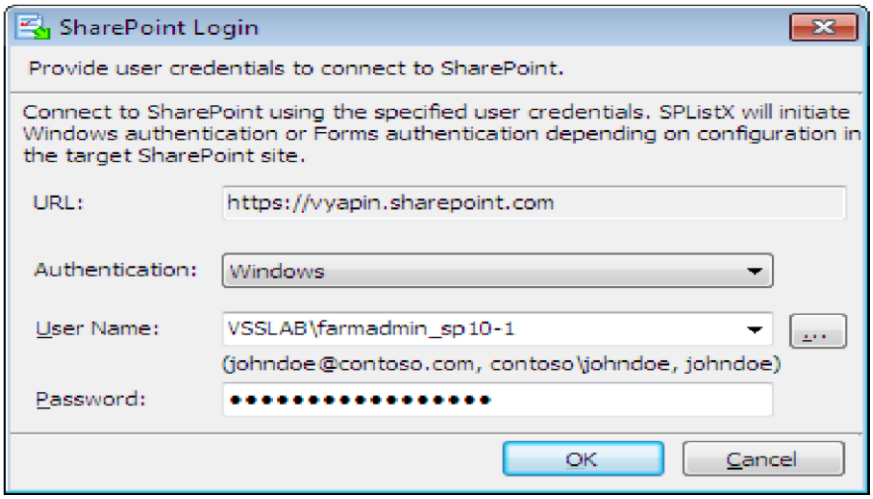
6) Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the keywords and help you verify the search results.

The **Trial Search** Dialog appears as shown below:

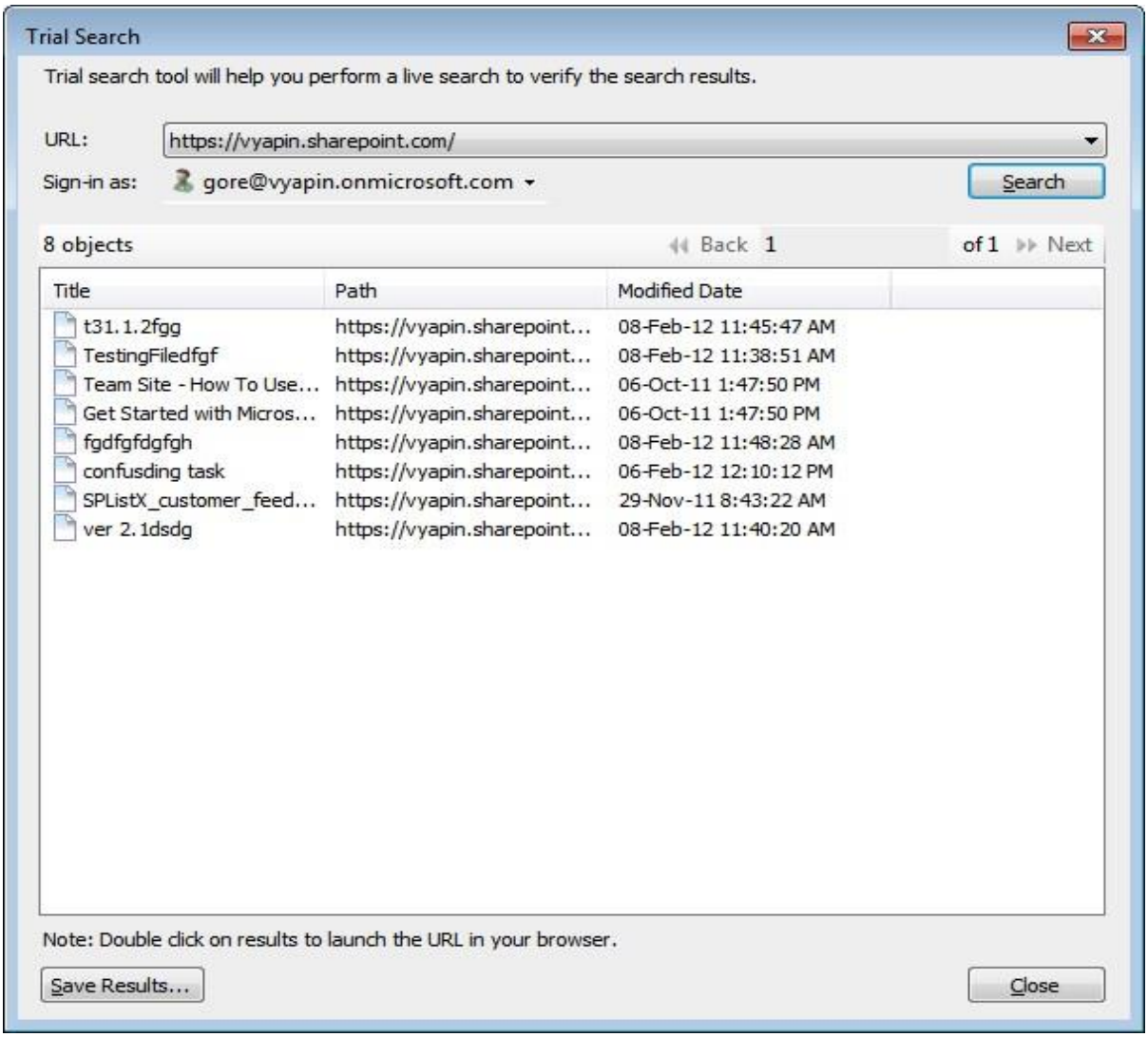


a) Select URL from the **URL** drop-down.

b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

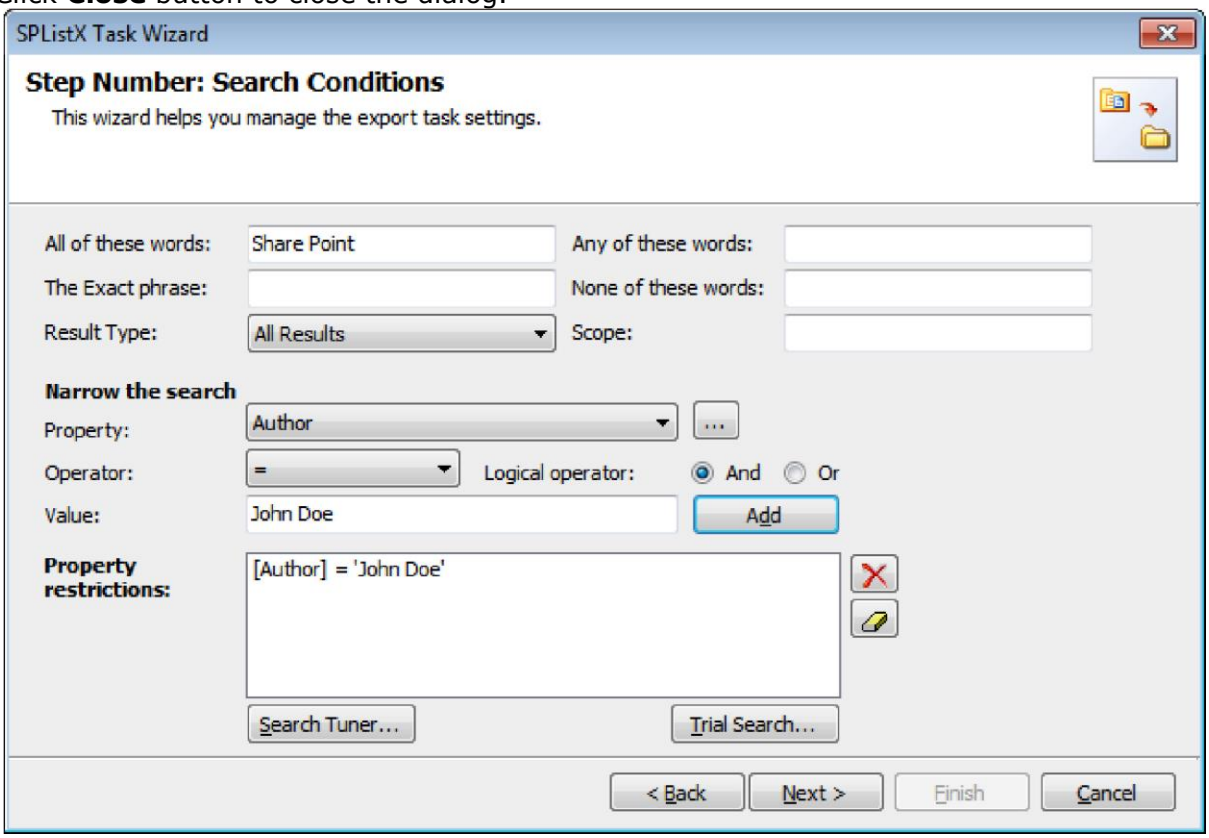


c) Click **Search** button to perform search.


Trial Search
Trial search tool will help you perform a live search to verify the search results.
URL:
https://vyapin.sharepoint.com/
Sign-in as:
gore@vyapin.onmicrosoft.com
Search
8 objects
Back 1 of 1 Next
Title
Path
Modified Date
t31.1.2fgg https://vyapin.sharepoint... 08-Feb-12 11:45:47 AM
TestingFiledfgf https://vyapin.sharepoint... 08-Feb-12 11:38:51 AM
Team Site - How To Use... https://vyapin.sharepoint... 06-Oct-11 1:47:50 PM
Get Started with Micros... https://vyapin.sharepoint... 06-Oct-11 1:47:50 PM
fgdfgfdgfgh https://vyapin.sharepoint... 08-Feb-12 11:48:28 AM
confusding task https://vyapin.sharepoint... 06-Feb-12 12:10:12 PM
SPListX_customer_feed... https://vyapin.sharepoint... 29-Nov-11 8:43:22 AM
ver 2.1dsdg https://vyapin.sharepoint... 08-Feb-12 11:40:20 AM
Note: Double click on results to launch the URL in your browser.
Save Results...
Close

Click **Save Results** button to save the search results in CSV or Excel format.

Click **Close** button to close the dialog.

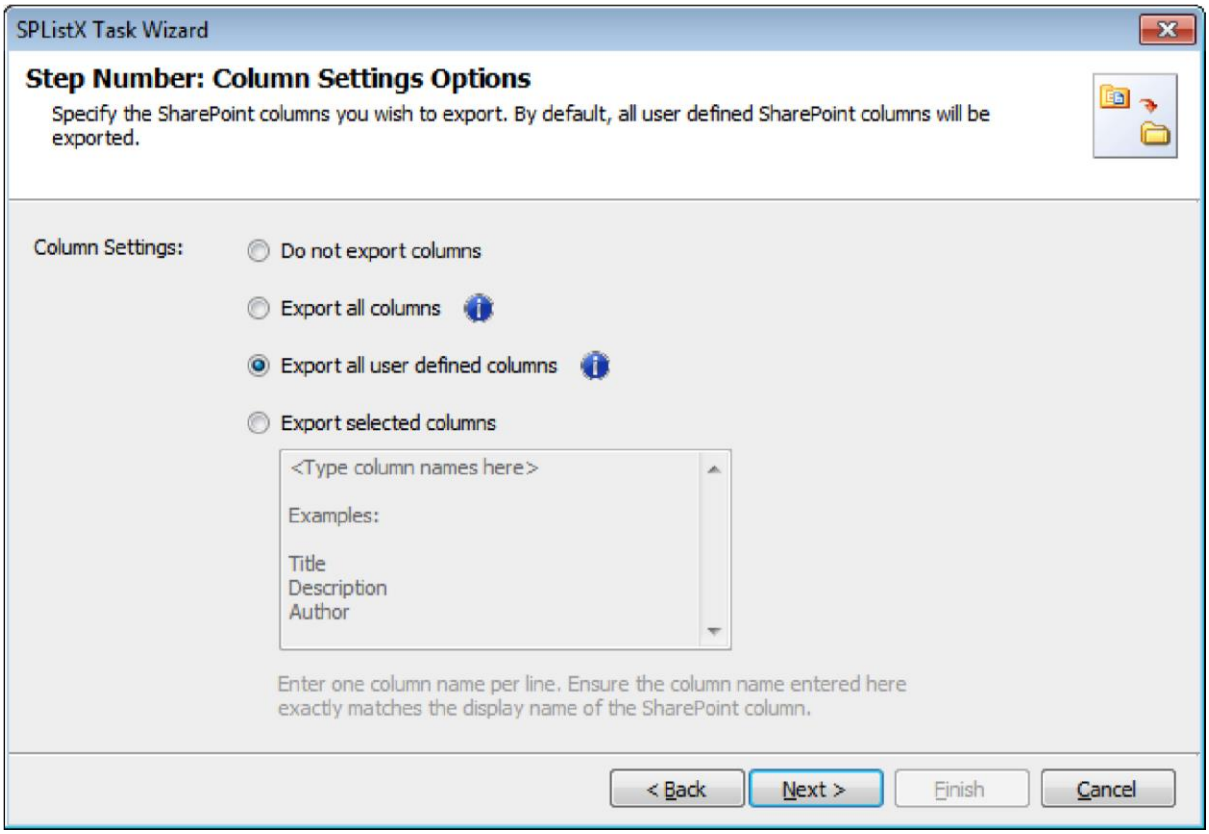


8) Click **Next** to proceed.

5.1.5 Column Settings Options

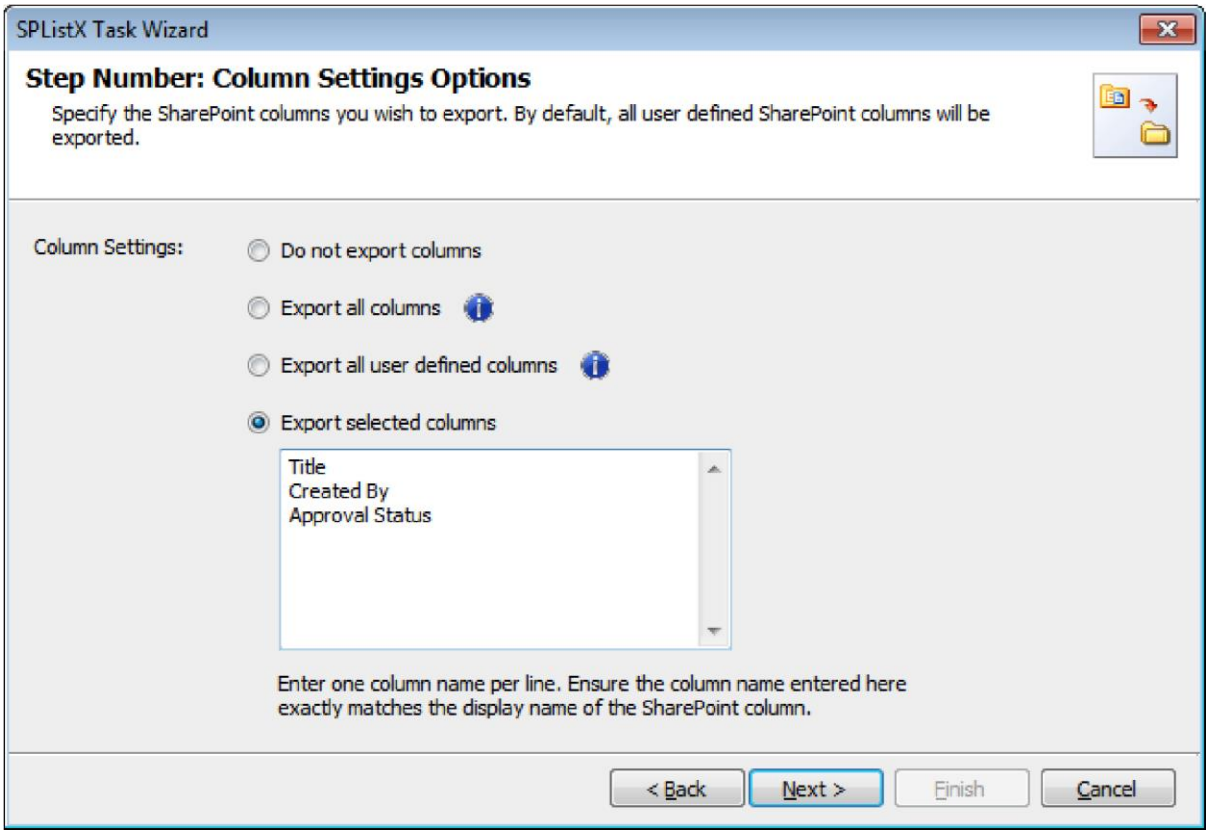
To selectively export metadata columns from the SharePoint list:

1) The **Column Settings Options** step appears as shown below:


SPListX Task Wizard
Step Number: Column Settings Options
Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.
Column Settings:
Do not export columns
Export all columns
Export all user defined columns
Export selected columns
<Type column names here>
Examples:
Title
Description
Author
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
< Back
Next >
Finish
Cancel

2) Select any one of the following metadata settings:

- **Do not export columns -** This option does not export columns.
- **Export all columns -** Exports all columns available in the source SharePoint list, including SharePoint system columns such as Created, Modified, Approval Status, etc.
- **Export all user defined columns -** Exports all columns that are created by a SharePoint user
- **Export selected columns -** Exports columns that are specified in the textbox

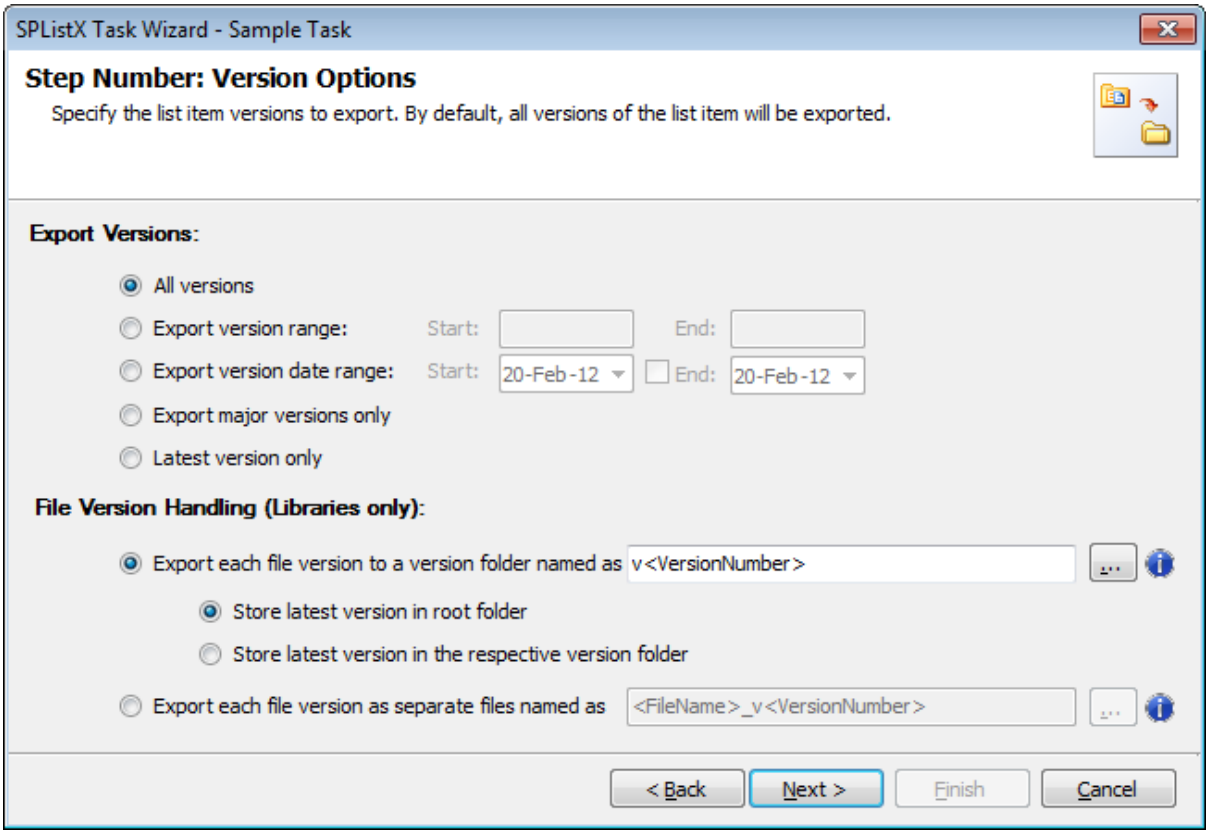

SPListX Task Wizard
Step Number: Column Settings Options
Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.
Column Settings:
Do not export columns
Export all columns
Export all user defined columns
Export selected columns
Title
Created By
Approval Status
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.
< Back
Next >
Finish
Cancel

Click **Next** to Proceed.

5.1.6 Version Options

To selectively export list item versions to the destination file system location:

1) The **Version Options** step appears as shown below:



2) Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list items exported from the list. Select any one of the following version settings:

a) All versions - Export all list item versions available in the source list.

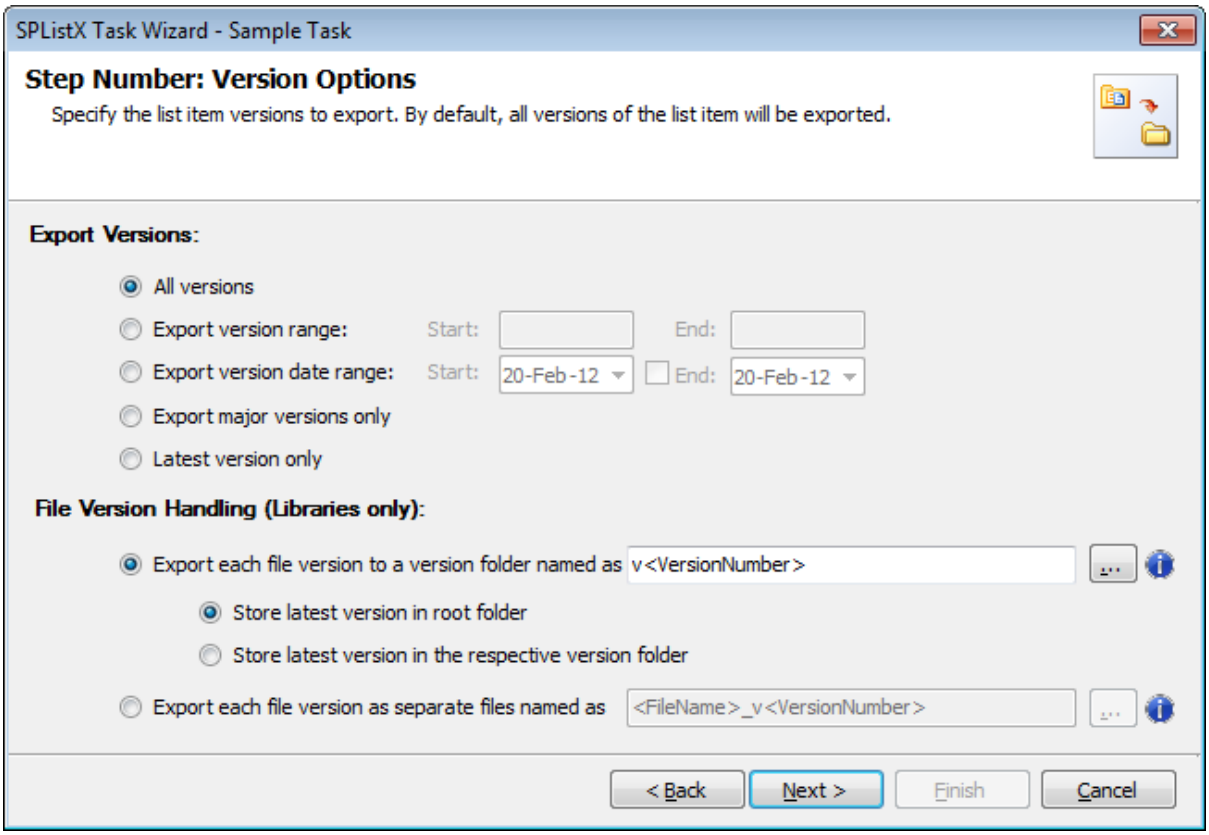
b) Export version range - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.

c) Export version date range - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.

d) **Export major versions only -** Export the major list item version from the source.

e) **Latest version only -** Export the latest list item version from the source.

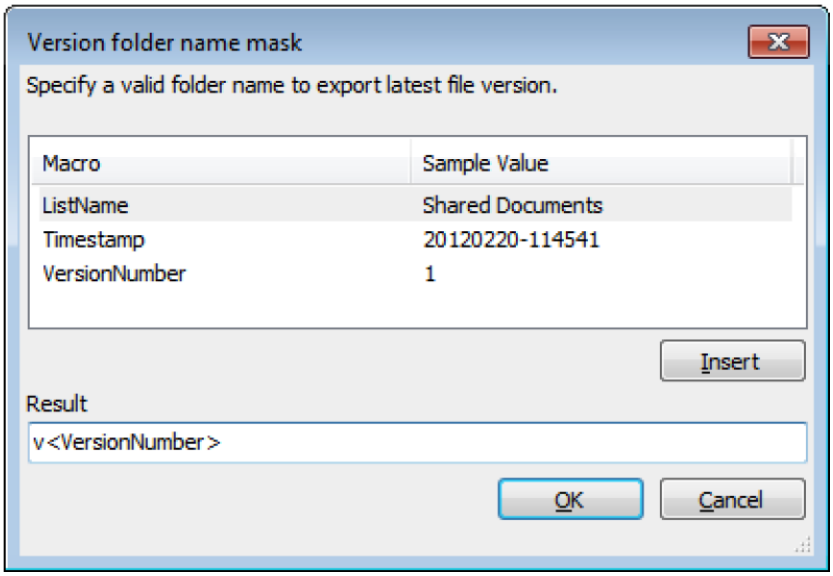
3) **File Version Handling:**



Select any one of the following export options:

a) **Export each version to a version folder named as -** This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.

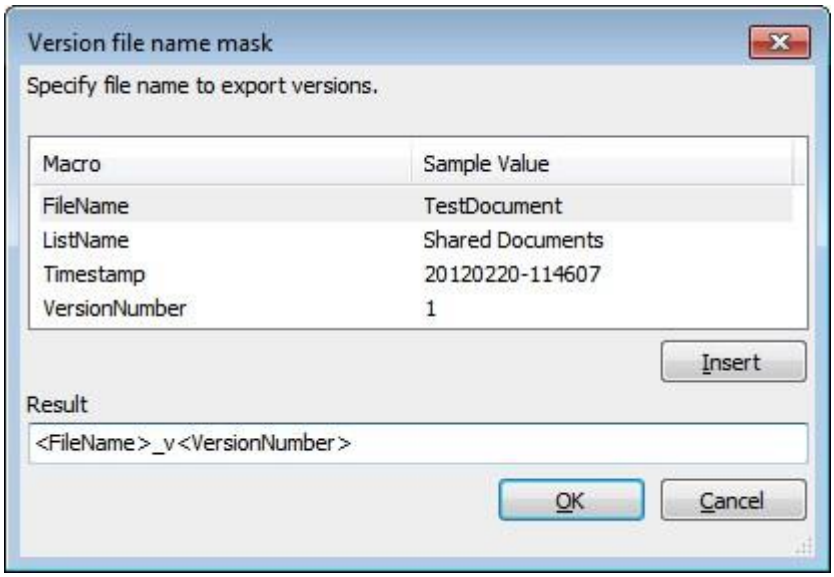
   i. **Store latest version in root folder –** Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox. Version folder name mask dialog appears as shown below:



You can use the available macros to construct the new folder name in the **Result** textbox.

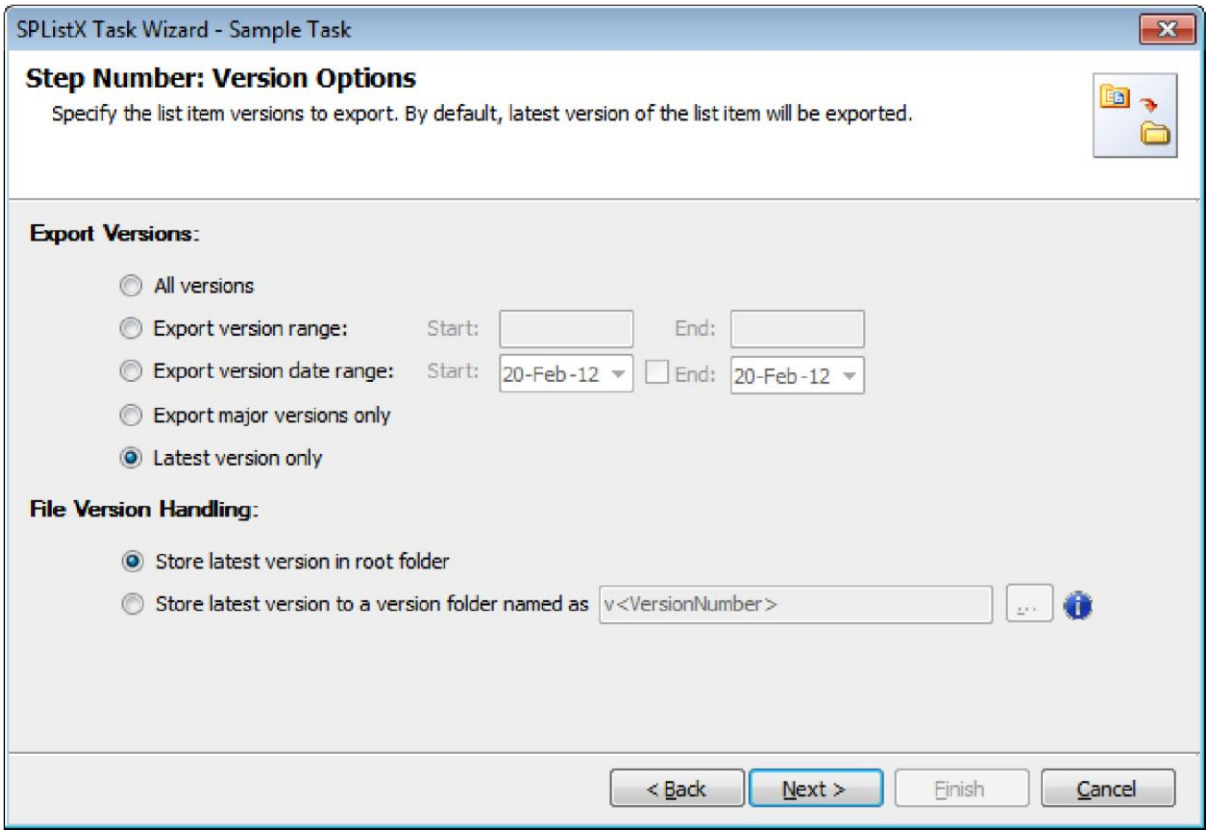
ii. **Store latest version in the respective version folder -** This option will create a version folder name based on the current file version and export the file into the version folder.

b) **Export each file version as separate files named as -** Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name,** click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below:



You can use the available macros to construct the new file name in the **Result** textbox.

4) Click **Next** to proceed.
For **Latest Version Only** option in the Export Versions, you have the option to export the latest file version to the root folder or export it to the respective version folder. The File Version Handling settings appear as shown below:



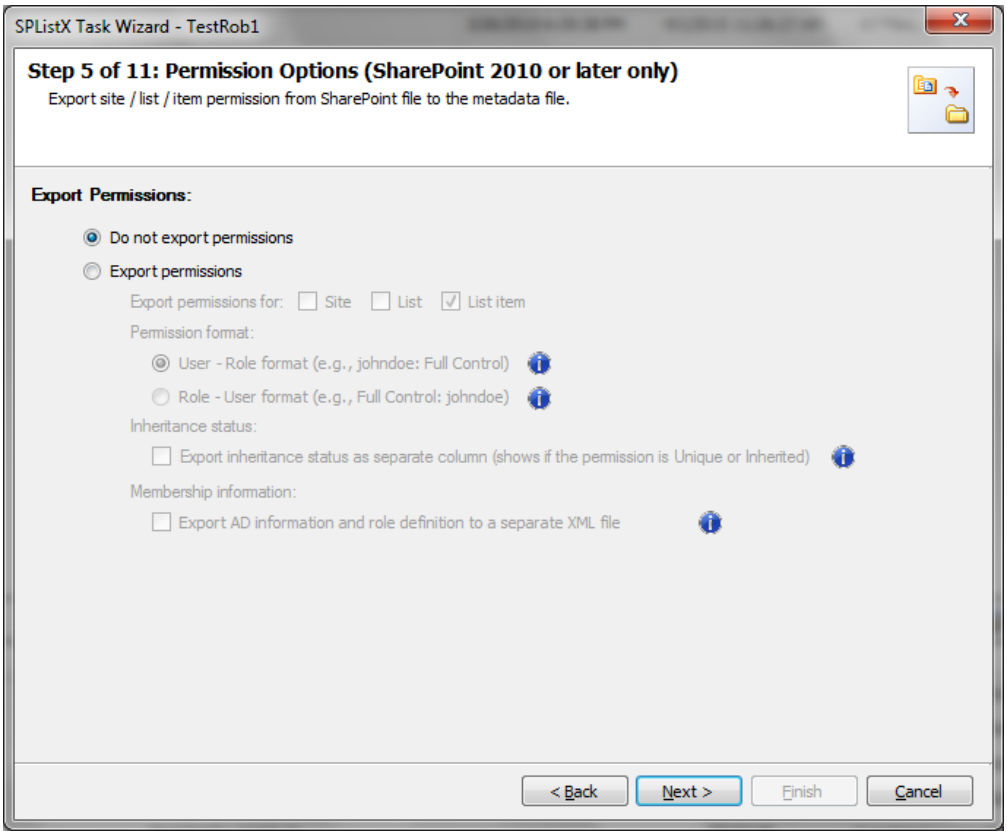
a) Store latest version in root folder - Export the latest version in the root folder itself

b) Store latest version in the respective version folder - Creates a latest version folder and export the latest file version in the latest version folder

5.1.7 Permission Options

SPListX can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 or later environment.

1) The **Permission options** specification wizard step appears as shown below:

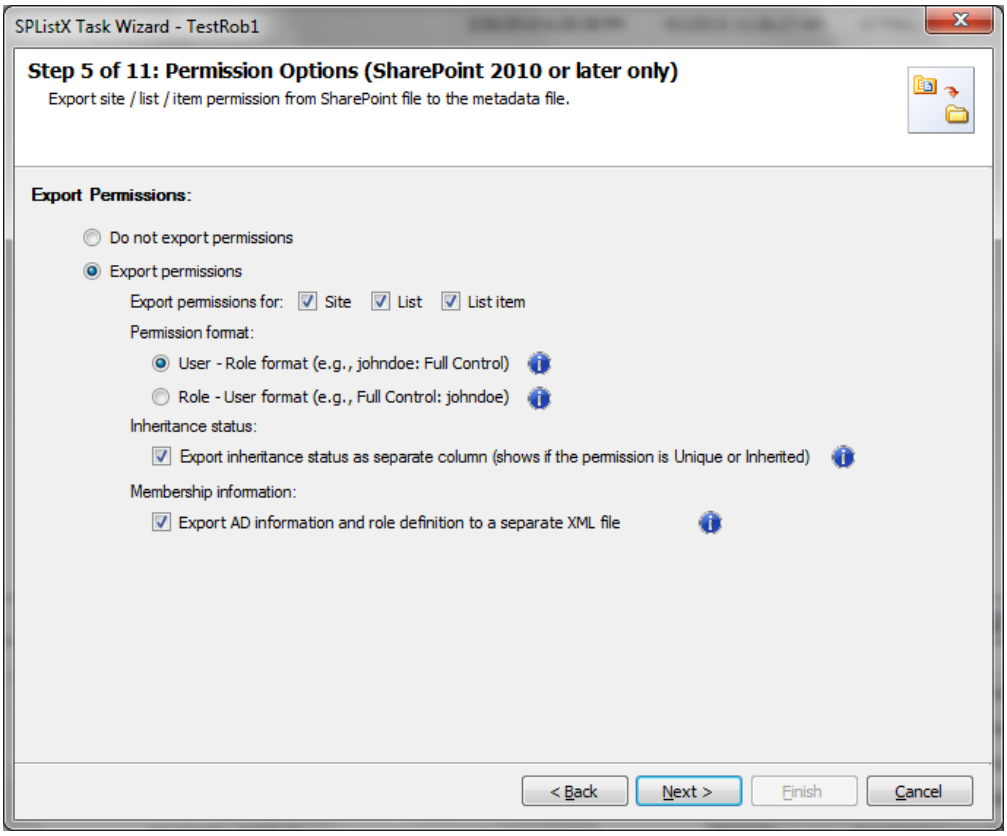

SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

Export Permissions:

a) Do not export permissions - This option will not export permissions to the metadata file.

b) Export permissions - This option will export permissions based on the user specified options.

The export permission options appear as shown below:


SPListX Task Wizard - TestRob1
Step 5 of 11: Permission Options (SharePoint 2010 or later only)
Export site / list / item permission from SharePoint file to the metadata file.
Export Permissions:
Do not export permissions
Export permissions
Export permissions for: Site List List item
Permission format:
User - Role format (e.g., johndoe: Full Control)
Role - User format (e.g., Full Control: johndoe)
Inheritance status:
Export inheritance status as separate column (shows if the permission is Unique or Inherited)
Membership information:
Export AD information and role definition to a separate XML file
< Back
Next >
Finish
Cancel

2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permission for**: options.

3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:

- **a) User - Role format –** Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
- **b) Role - User format –** Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.

4) Inheritance status - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.

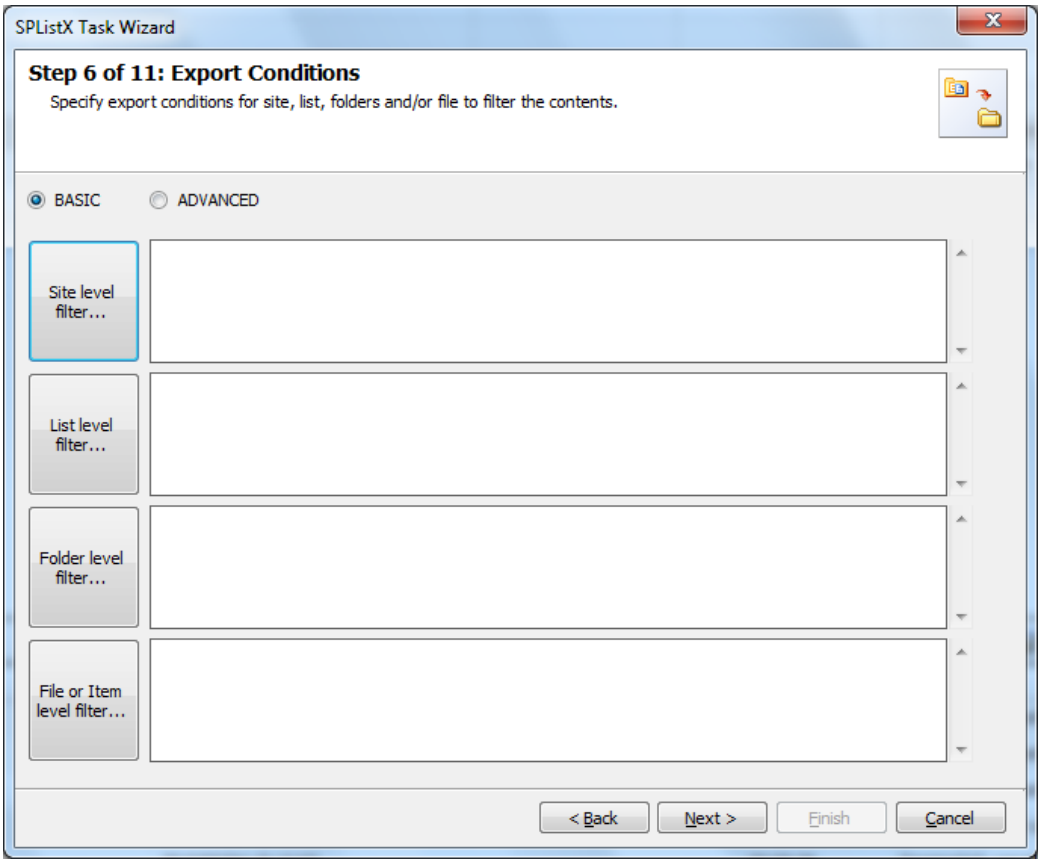
5) Membership information - This option exports AD informtion and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name _membershipinformation and _roledefinition. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information. SPListX will enumerate only the globally declared domain groups and retrieve membership information.

6) Click **Next** to Proceed.

5.1.8 Export Conditions

SPListX can export folders, files and list items (including file attachments) from a SharePoint list or library based on certain export conditions. The conditions can be created by using SharePoint columns in the source list or library.

1) The Export Conditions step appears as shown below:



2) You can specify one of the following methods of exporting conditions:

- BASIC
- ADVANCED

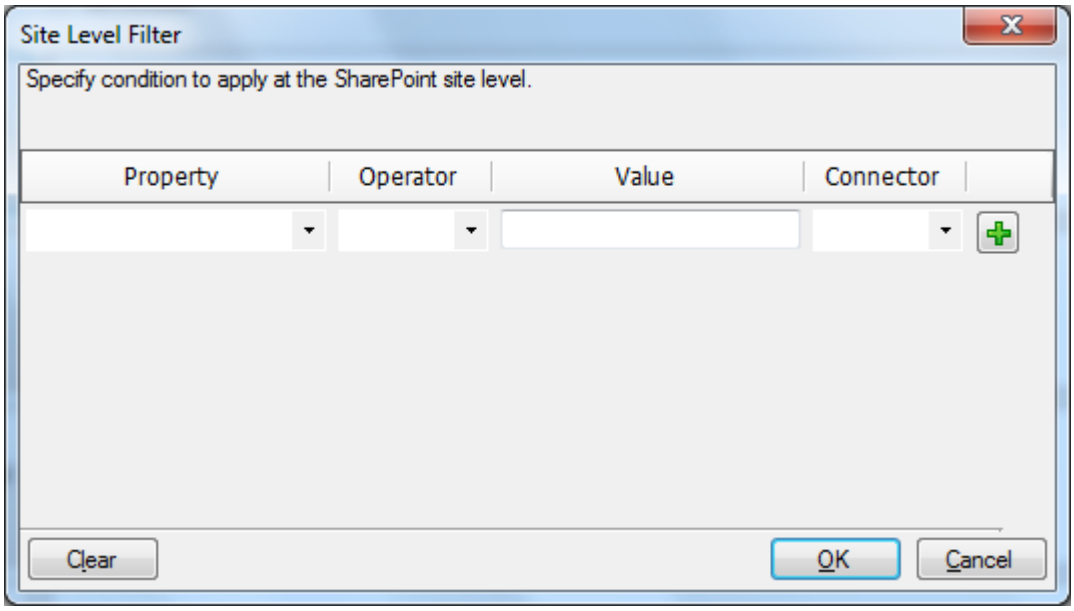
2.1) BASIC

You can specify export conditions at three levels:

Site Level Filter
List Level Filter
Folder Level Filter
File or Item Level Filter

a. Site Level Filter

Click Site level filter to specify the filter conditions. The Site Level Filter dialog appears as below:



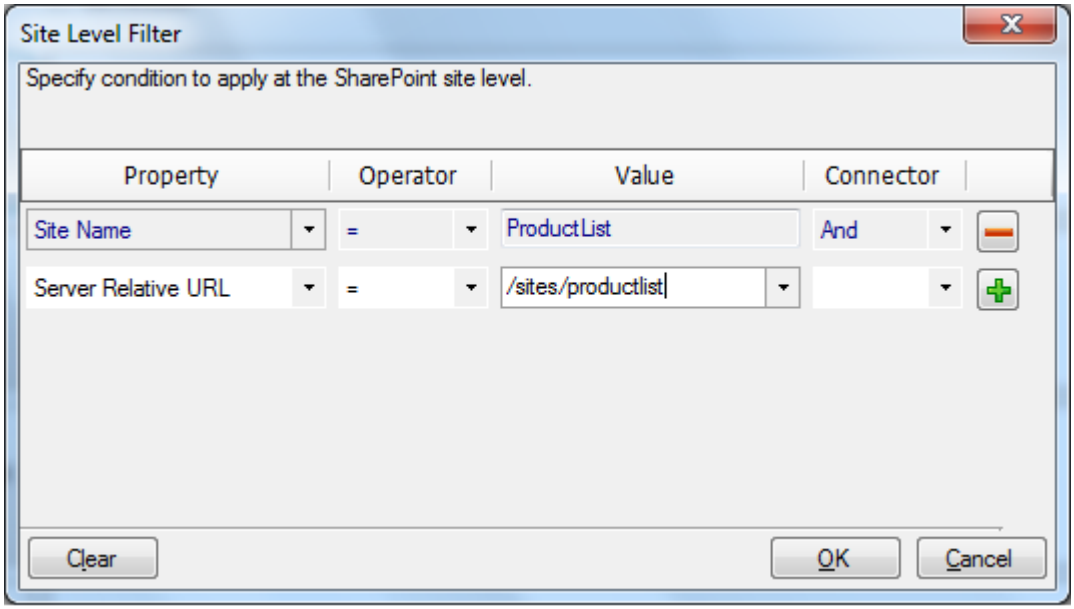
You can specify the export filters by selecting the site name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

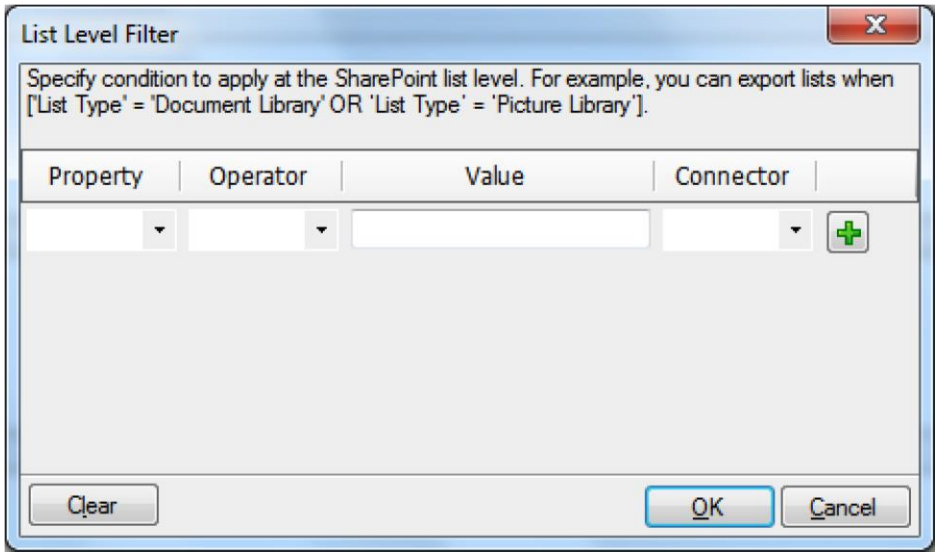
Click **Clear** to remove all the filters specified.



SPListX will export the sites that satisfy the export conditions depending on the option selected by the user.

b. List Level Filters

Click **List level filter** to specify the filter conditions. The **List Level Filter** dialog appears as below:


List Level Filter
Specify condition to apply at the SharePoint list level. For example, you can export lists when ['List Type' = 'Document Library' OR 'List Type' = 'Picture Library'].
Property
Operator
Value
Connector
Clear
OK
Cancel

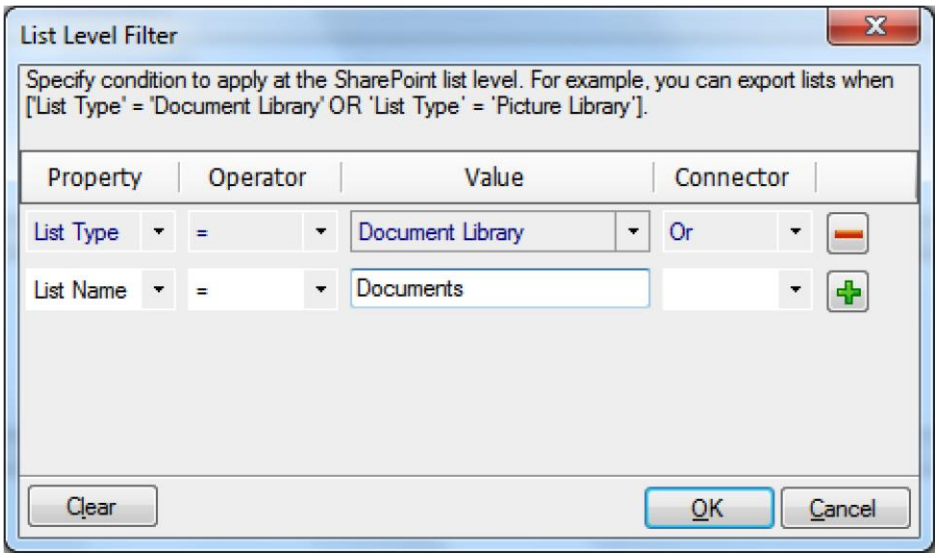
c. You can specify the export filters by selecting the field name and by specifying a value with necessary operator. You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed using logical

operators 'AND' and 'OR'

Click to add multiple filters.

Click to remove the filter from the filter list.

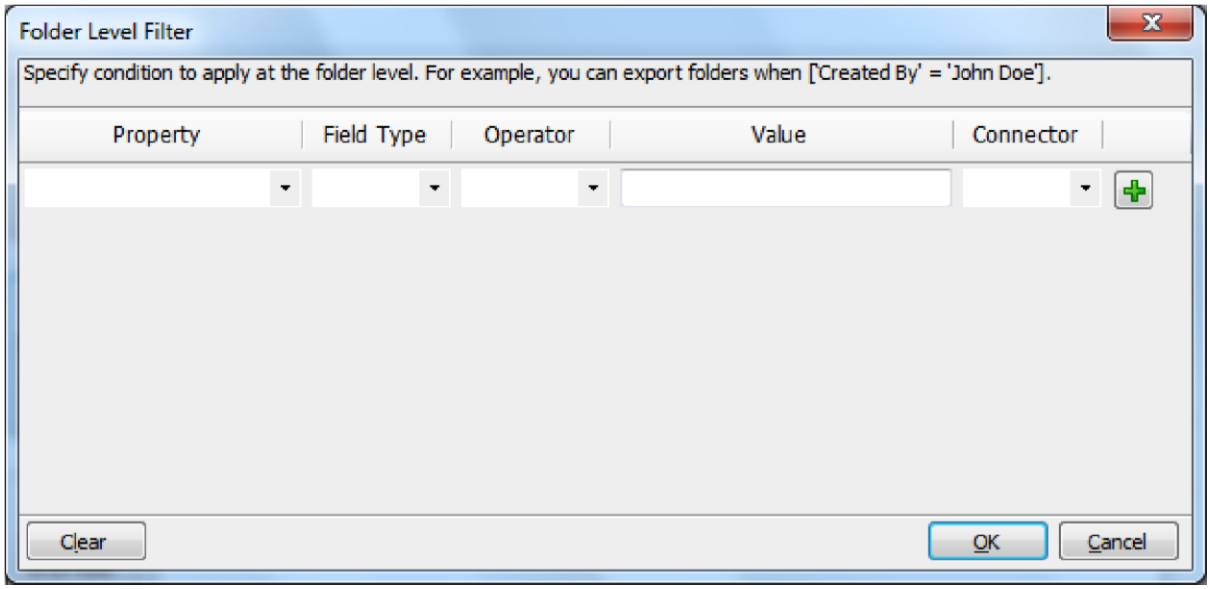
Click **Clear** to remove all the filters specified.



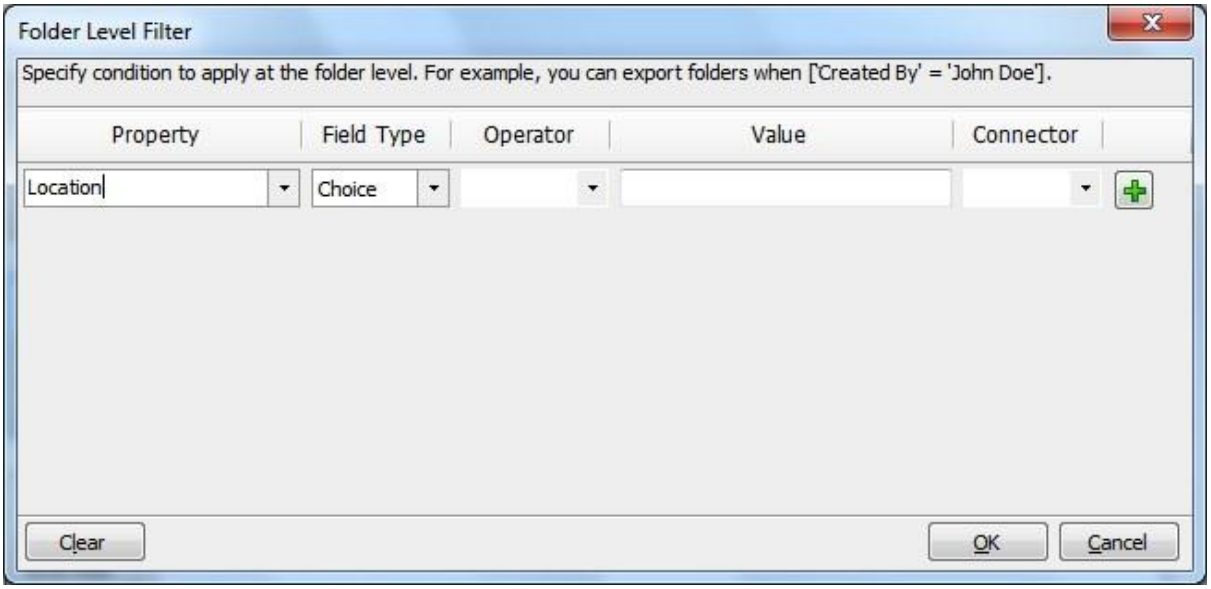
SPListX will export the lists that satisfy the export conditions depending on the option selected by the user.

d. Folder Level Filters

Click **Folder level filter** to specify the filters. The Folder Level Filter dialog appears as below:



d. You can enter the SharePoint Column Name in the Property drop down. Select the data type of the specified SharePoint Column in Field Type drop down.

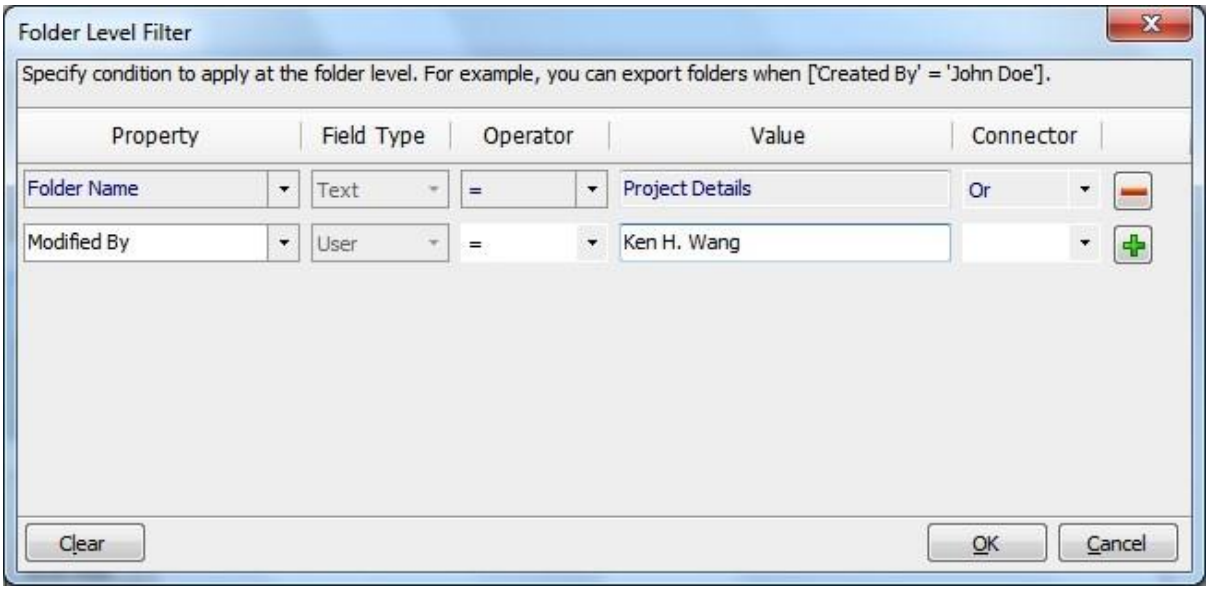


e. You can specify the export filters by selecting the field name and by specifying a value with necessary operator. You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed with the use of logical operators 'AND' and 'OR'.

Click to add multiple filters.

Click to remove the filter from the filter list.

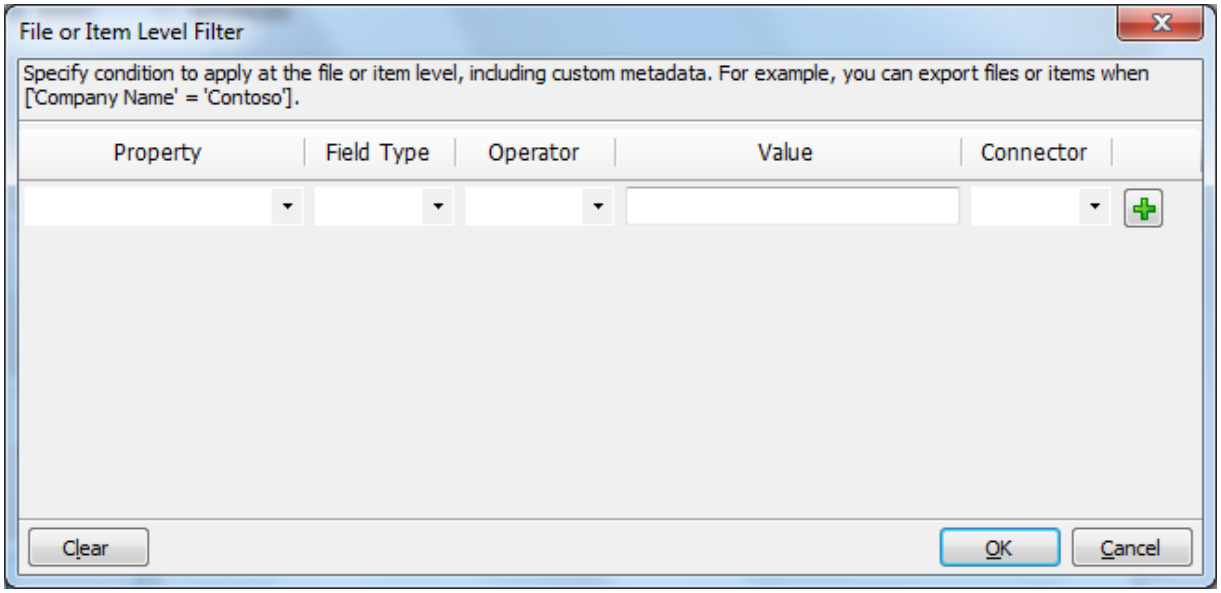
Click **Clear** to remove all the filters specified.



SPListX will export the folders that satisfy the export condition depending on the option selected by the user.

f. File or Item Level Filters

Click File or Item Level to specify the filters. The File or Item Level Filter dialog appears as below:


File or Item Level Filter
Specify condition to apply at the file or item level, including custom metadata. For example, you can export files or items when ['Company Name' = 'Contoso'].
Property
Field Type
Operator
Value
Connector
Clear
OK
Cancel

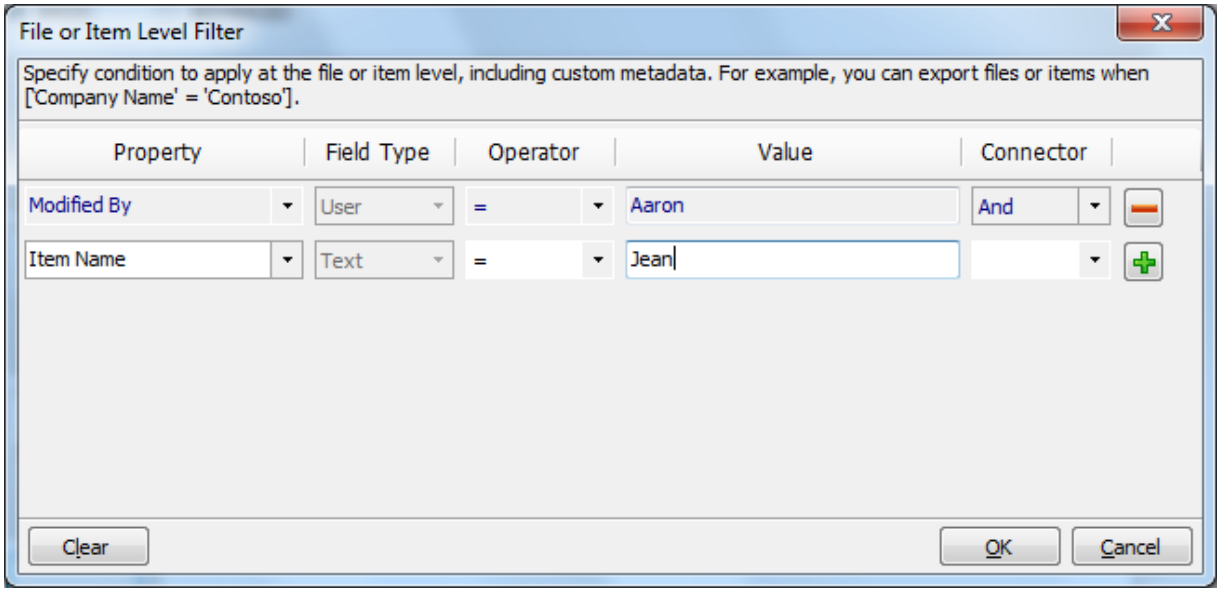
You can specify the export filters by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as =, <> to define your query. Complex queries can be constructed with the use of logical operators 'AND' and 'OR'.

Click to add multiple filters.

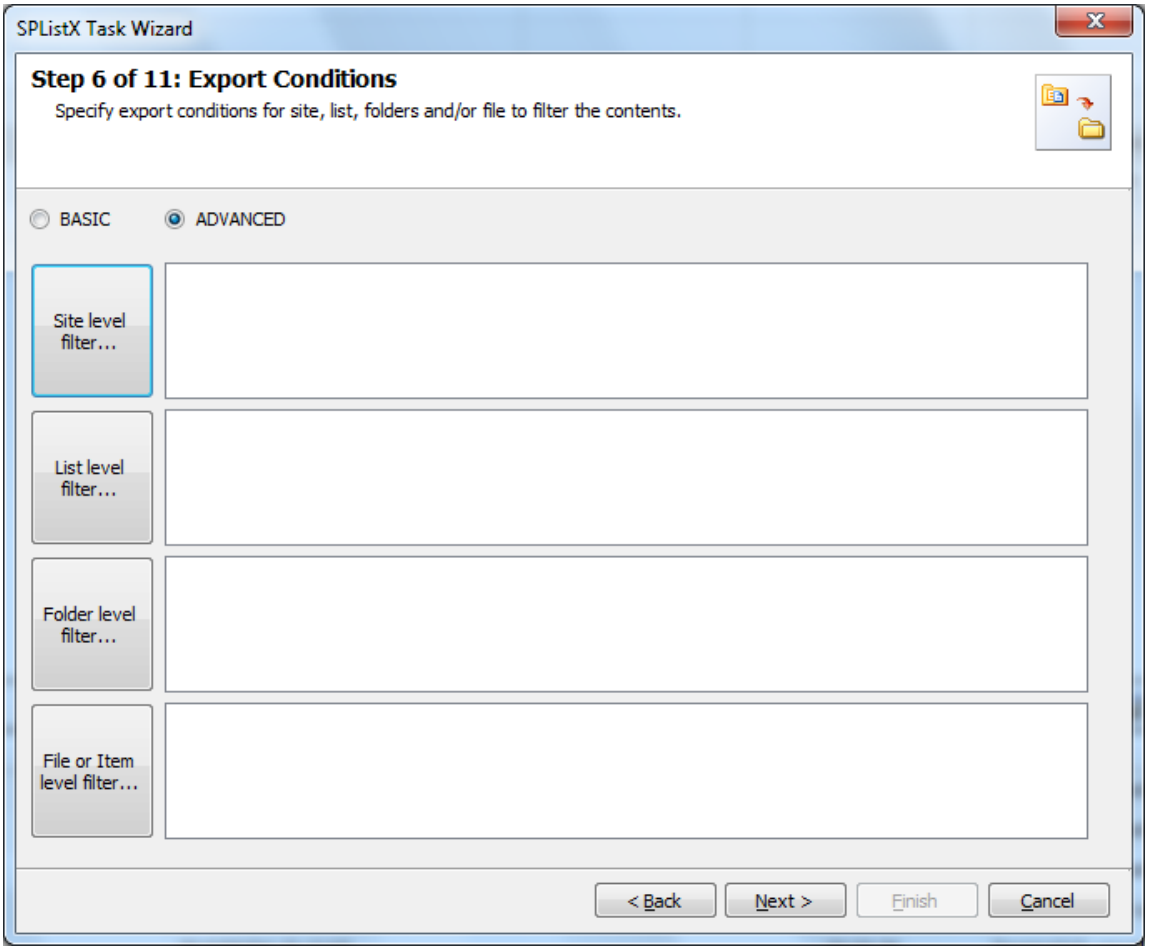
Click to remove the filter from the filter list.

Click **Clear** to remove all the filters specified.



SPListX will export the folders that satisfy the export condition depending on the option selected by the user.

ADVANCED



You can specify export conditions at three levels:

Site Level Filter

List Level Filter

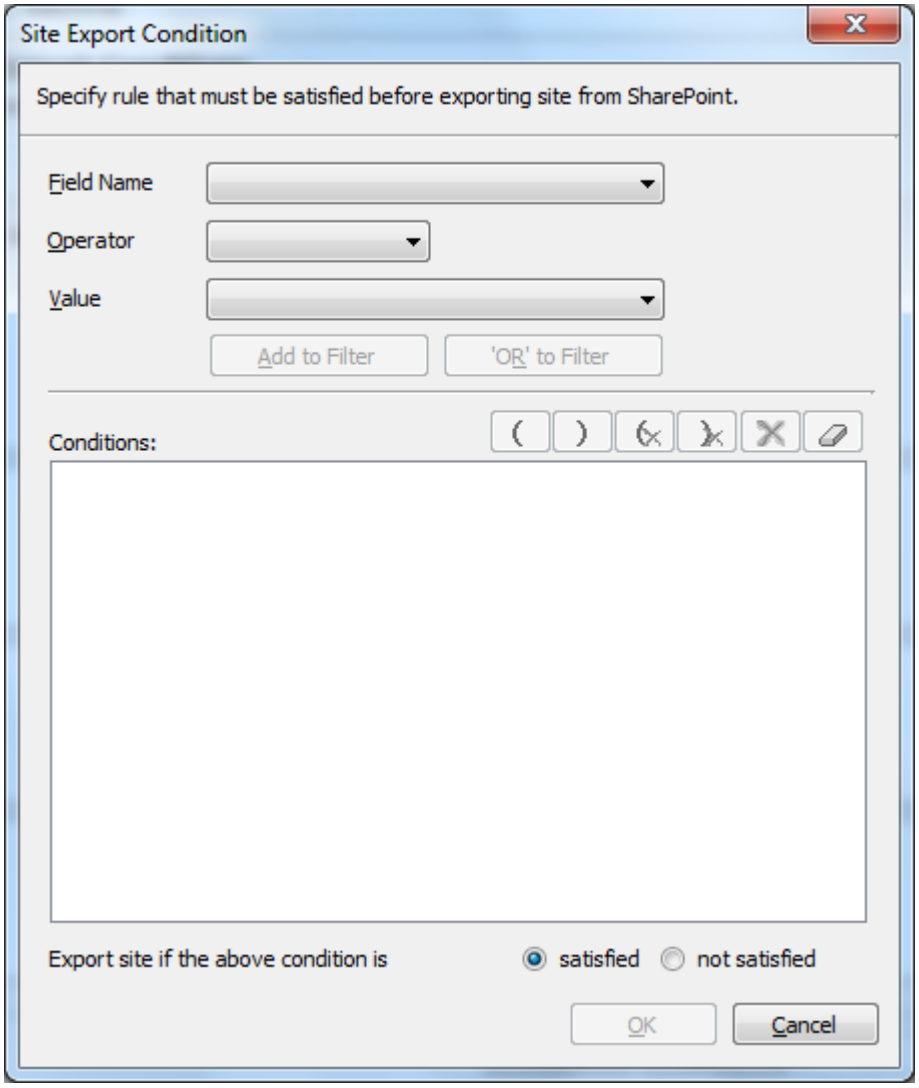
Folder Level Filter

File or Item Level Filter

a. Site Level Conditions

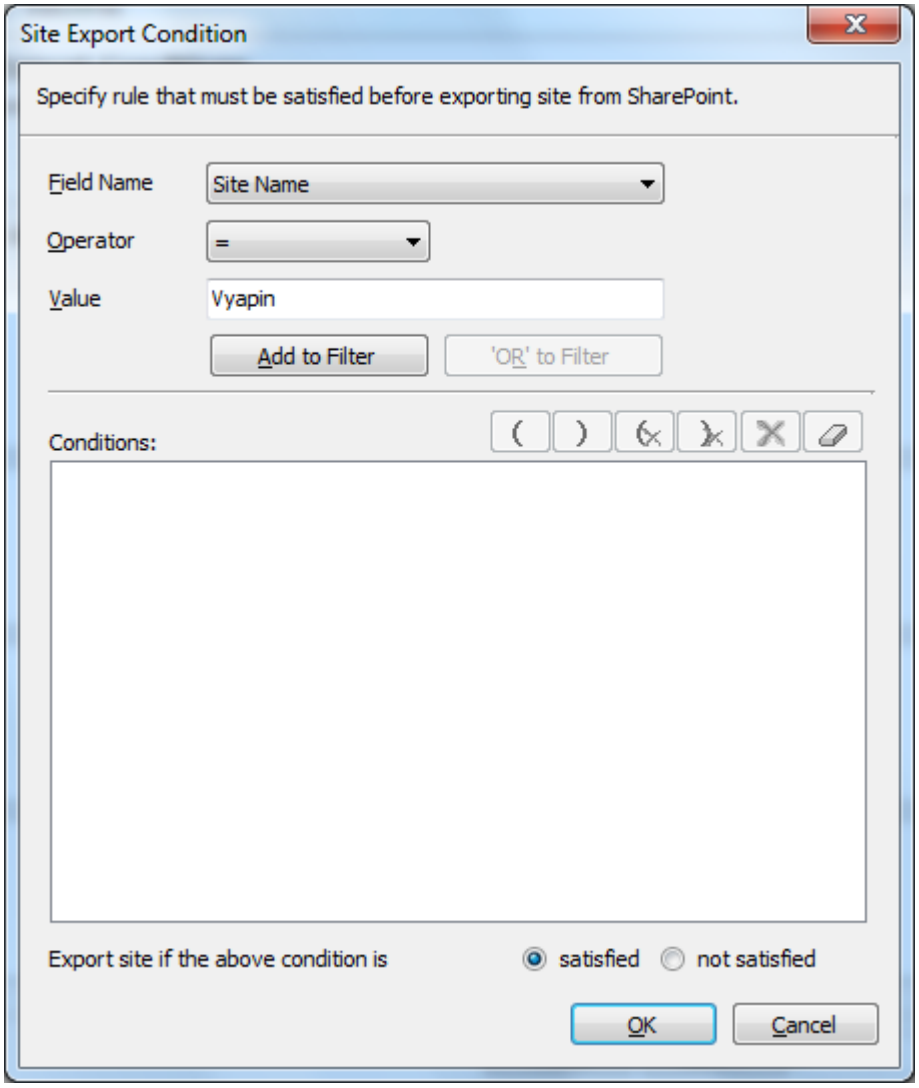
Click **Site level filter** to specify the conditions

The **Site Export Conditions Dialog** appears as shown below:



You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



SPListX will export the sites that satisfy the export condition or export the sites that do not satisfy the export condition depending on the option selected by the user:

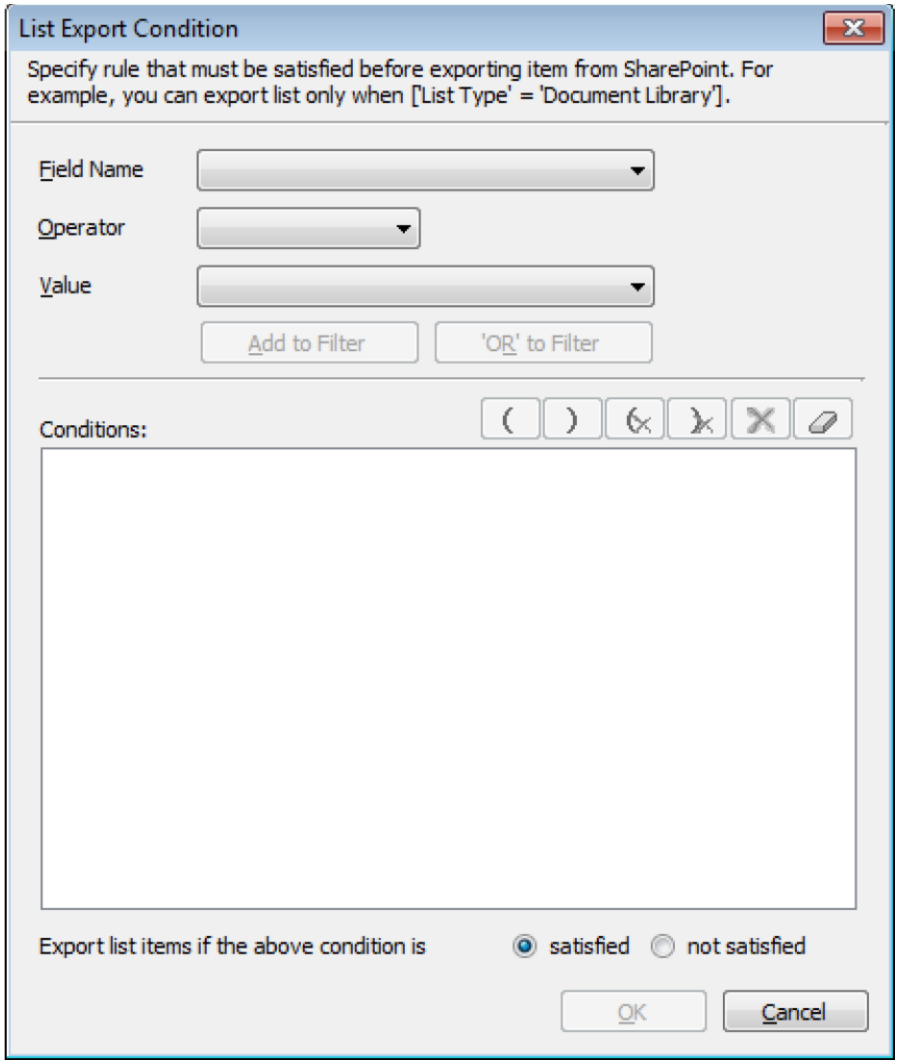
Export sites if the above conditions are satisfied - Sites that satisfy the condition will be marked for export.

Export sites if the above conditions are not satisfied - Sites that do not satisfy the condition will be marked for export.

b. List Level Conditions

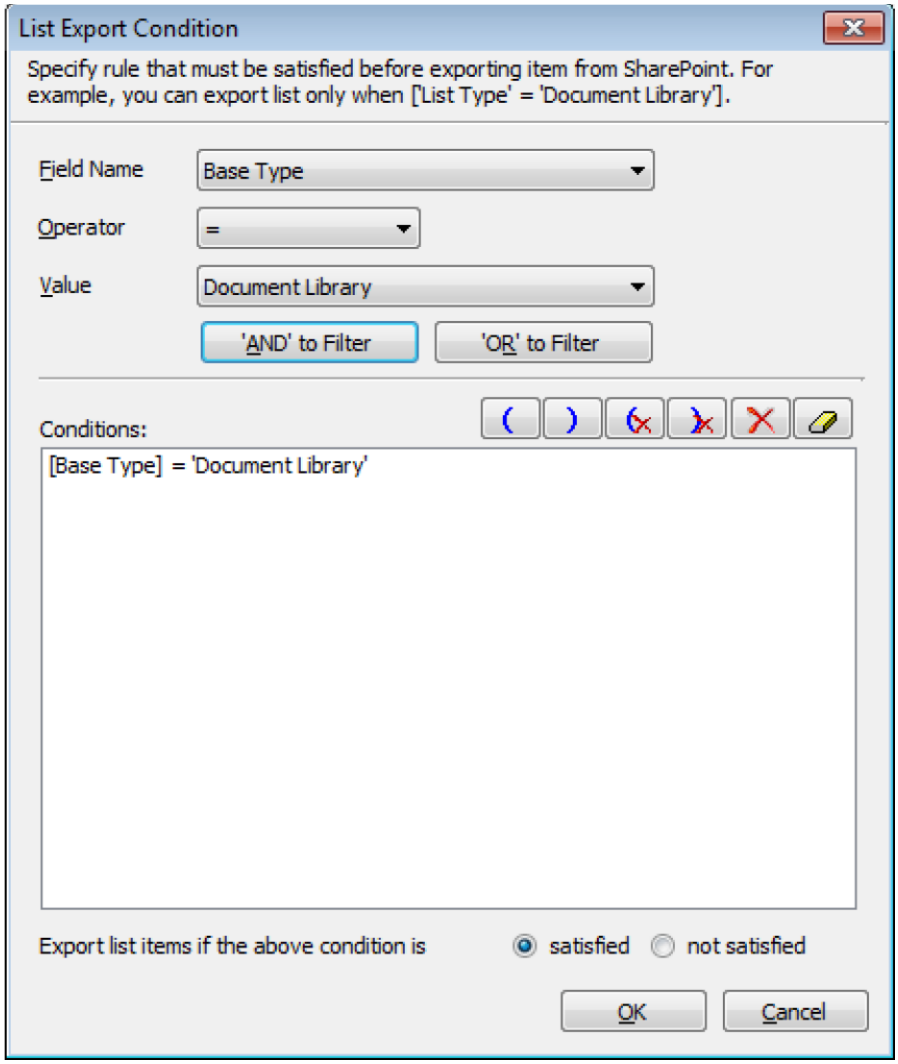
Click List level filter to specify the conditions

The List Export Conditions Dialog appears as shown below:



c. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



d. SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

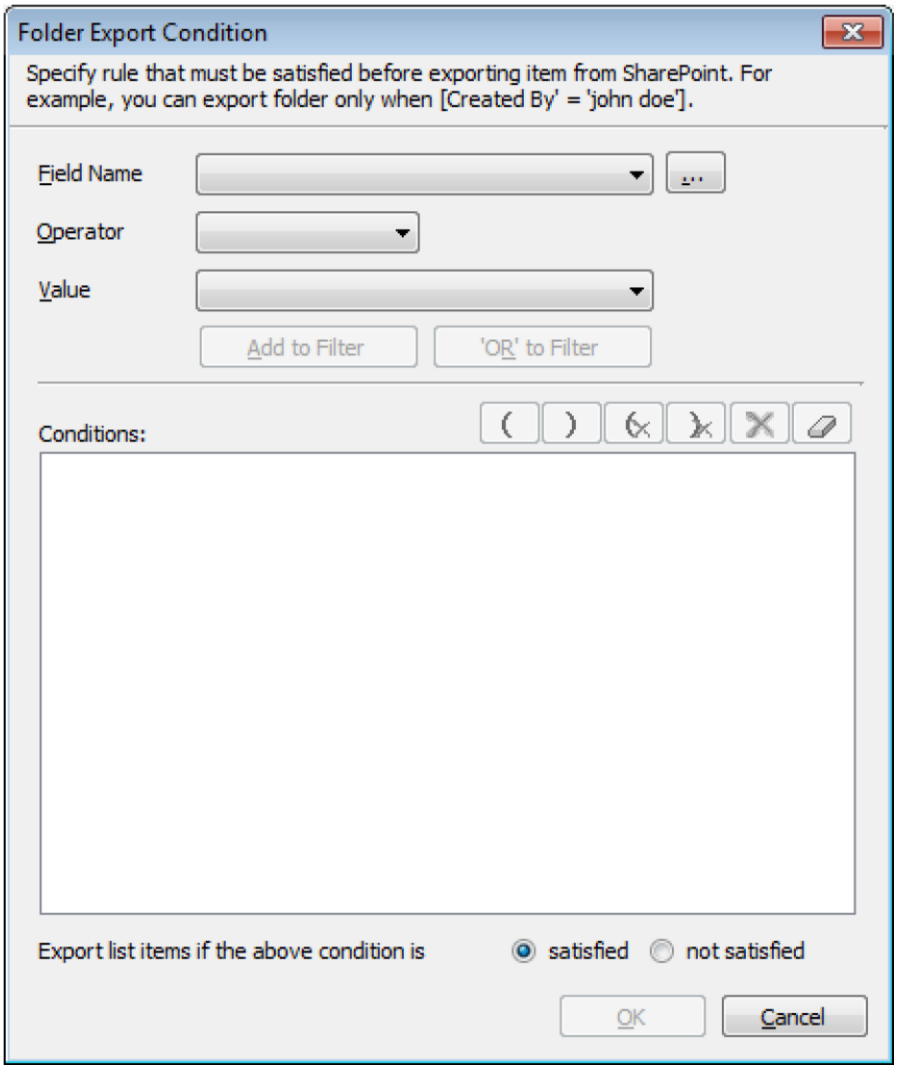
- Export list items if the above conditions are satisfied - Lists that satisfy the condition will be marked for export.

- Export list items if the above conditions are not satisfied - Lists that do not satisfy the condition will be marked for export.

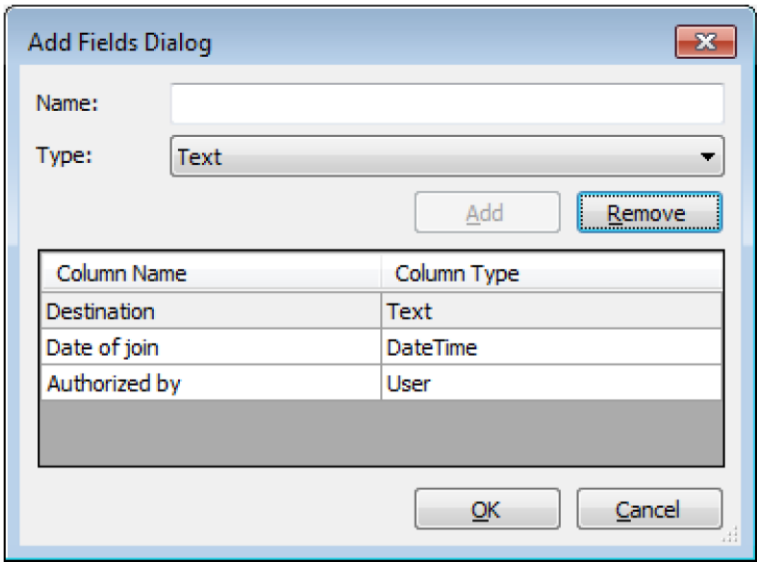
d. Folder Level Conditions

Click **Folder level filter** to specify the conditions

The **Folder Export Conditions** Dialog appears as shown below:



e. Click (...) button to add the SharePoint columns in Field Name dropdown. The Add Fields Dialog appears as shown below:



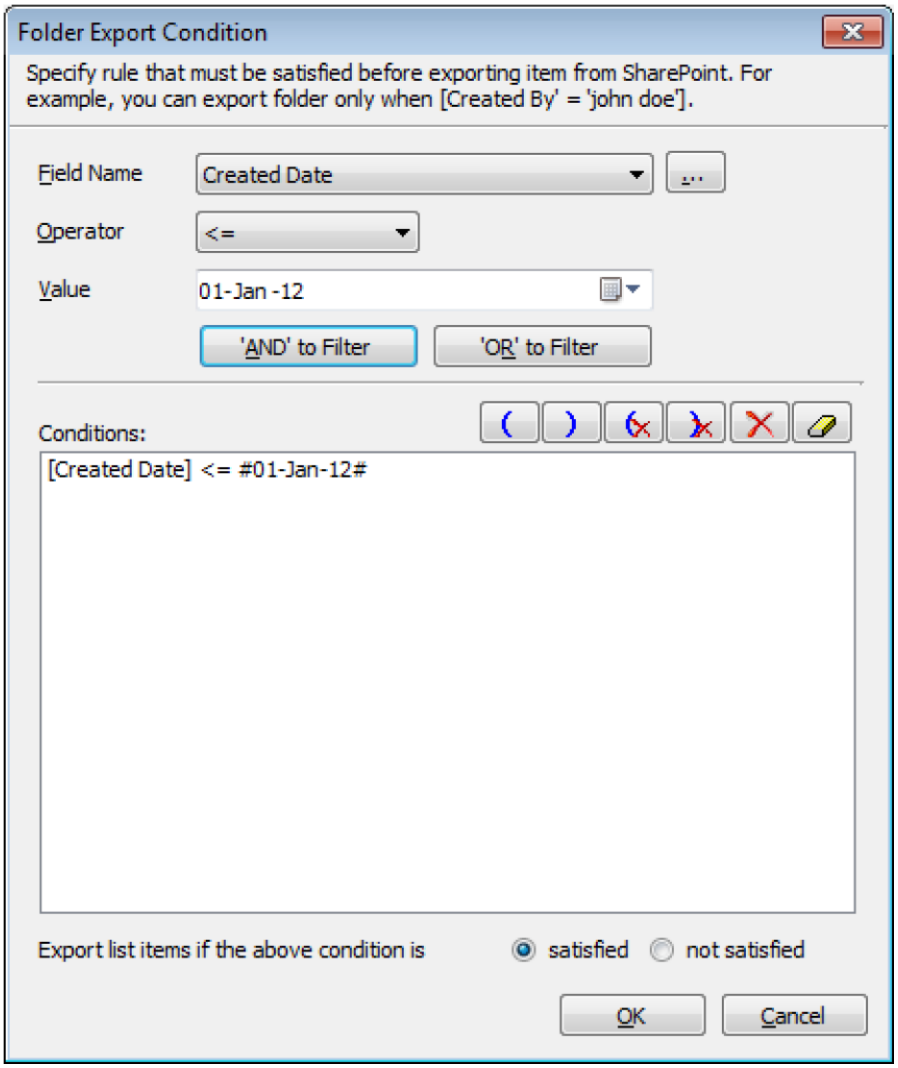
Specify the column name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Click Add button to add the columns to the fieldname dropdown list.

Click Remove button to remove the columns from the fieldname dropdown list.

f. You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =,<> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



g. SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- Export list items if the above conditions are satisfied - Folders that satisfy the condition will be marked for export.
- Export list items if the above conditions are not satisfied - Folders that do not satisfy the condition will be marked for export.

h. File or Item Level Filters

Same as Folder Level Filters

3) Click **Next** to proceed.

Examples of Export Conditions

SPListX exports folders & files / attachments along with metadata to the file system location based on export conditions defined in the export task. Export conditions can be constructed using metadata columns and its values.

A few examples of list conditions are as follows:

Export Condition	Description
[Server Relative URL] = '/site name/subsite name/lists/list name'	Exports list items that have server relative URL as '/site name/subsite name/lists/list name' For example: [Server Relative URL] = '/vyapin/sharepoint/lists/Product List'
[List Name] = 'Cities'	Exports list item and attachments of lists named as 'Cities'
[List Type] = 'Document Library'	Exports documents from all document libraries in the entire web application.
[Base Type] <> 'Document Library'	Exports list items and attachments of all custom lists (other than document libraries) that are present in the entire web application.

A few examples of item and folder export conditions are as follows:

Export Condition	Description

[Modified Date] > '09/09/2010'	Assuming the date specified by the user is in MM/DD/YYYY format and with this condition, SPListX exports list items that have been modified after 9th September 2009.
[Created By] = 'John Doe'	Exports list items that have been created by 'John Doe'
[Created Date] >= #09/01/2010# AND	Assuming the date specified by the user is in
[Created Date] <= #09/30/2010#	MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.
[Content Type] = 'Document'	Exports list items that have content type as 'Document'
[Modified By] = 'John Doe'	Exports list items that have been modified by 'John Doe'

The following section describes the data types supported by SharePoint and an example of how to state the export condition.

SharePoint Data Type	Example	Description
Yes/No	[Document Verified] = 'Yes'	SPListX exports list items that have the 'Document Verified' value set to 'Yes'.
Text	[Title] <> 'Research'	SPListX exports only list items that do not have 'Research' as value for 'Title' field.
Date and Time	[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#	Assuming date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.
Number	[Product ID] > 10 OR [Product ID] <=100	SPListX exports list items that have 'Product ID' value lies in between 10 to 100.
Currency	[Product Cost] = 100	SPListX exports list items that have 'Product Cost' value equal to 100.

Choice	[City] = 'New York' [City] = 'London;Paris;Singapore'	Text or Number values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'City' column value set as 'London', 'Paris' and 'Singapore'.
Lookup	[Product Code] = 100 = [Product Code] 123ABC;154XYZ	The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have '123ABC' and '154XYZ' as value for 'Product Code' field.
People or Group	[Document Reviewed by] ='John Doe' [Document Reviewed by] ='John Doe; Jane Doe'	User or group values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'Document Reviewed by' value set to 'John Doe' and 'Jane Doe'.

Incremental export in SPListX

Apart from relational operators, SPListX allows you to construct flexible export conditions by using the Changed operator for periodic import for the fields 'Created Date (SharePoint)' and 'Modified Date (SharePoint)'. The following built-in values can be used for this operator:

Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Update in SharePoint, Since Last Export in SPListX, Last 7 days and Last 14 days.

By using **Changed** operator, you can filter the list items based on the above mentioned values from SharePoint list.

For example, if you need to migrate list items that are modified in SharePoint today, you can specify a export condition as stated below:

[Modified Date] Changed [Today]

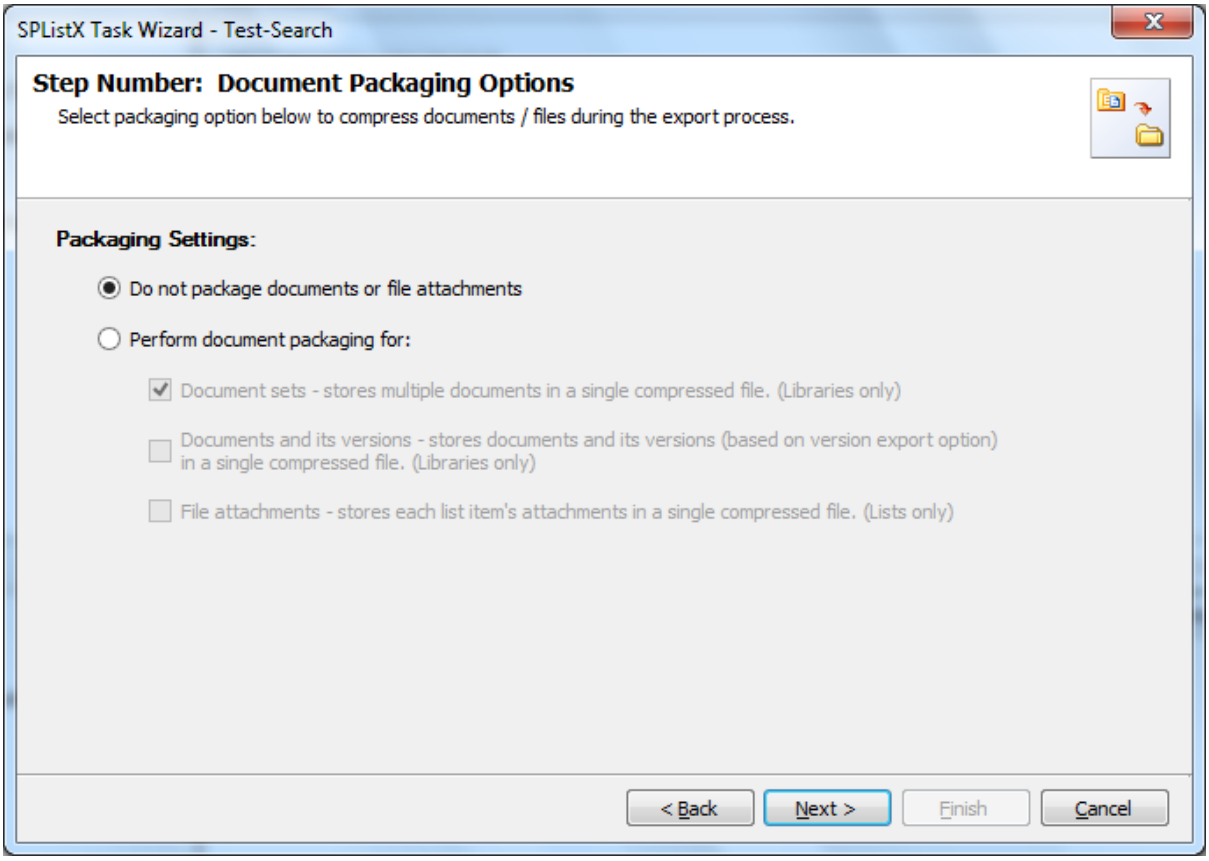
Operator & Value	Description	An Example	Result/Remarks
Changed Today	Exports list items that are created or modified in the present day (at the time of export) in	[Modified Date] Changed [Today]	SPListX compares the source list item modified date value with the current day (at the time of export) and exports
	SharePoint.		the list items which are modified on the current day.
Changed Yesterday	Exports list items that are created or modified yesterday (at the time of export) in SharePoint.	[Created Date] Changed [Yesterday]	SPListX compares the source list item created date value with yesterday (day before at the time of export) and migrates the matching list items.
Changed This Week	Exports list items that are created or modified in the current week.	[Modified Date] Changed [This Week]	SPListX checks the source list item's modified date value and exports the items that are changed in the current week.
Changed This Month	Exports list items that are created or modified in the current month.	[Modified Date] Changed [This Month]	SPListX checks the source list item's modified date value and exports the items that are changed in the current month.
Changed Last Week	Exports list items that are created or modified in the last week.	[Created Date] Changed [Last Week]	SPListX checks the source list item's created date value and exports those items that are changed in last (previous) week.

Changed Last Month	Exports the list items that are created or modified in the last month.	[Modified Date] Changed [Last Month]	SPListX checks the source list item's modified date value and exports those items that are changed in last (previous) month.
Changed Since Last Export using SPListX	Exports list items that are modified in the source folder, since the last export using SPListX. It is based on the last 'Export date and time' value internally maintained for the	[Modified Date] Changed [Since Last Export using SPListX]	SPListX compares the source list item's modified date value with list item's last export date and time maintained by the application and proceeds with the export accordingly.
	list item in SPListX.		
Changed Last 7 days	Exports list items that are created or modified in the last 7 days.	[Modified Date] Changed [Last 7 days]	SPListX checks the source list item's modified date value and exports the items that are changed in the last 7 days.
Changed Last 14 days	Exports list items that are created or modified in the last 14 days.	[Modified Date] Changed [Last 14 days]	SPListX checks the source list item's modified date value and exports the items that are changed in the last 14 days.

5.1.9 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets, document / file versions and file attachments as packaged contents grouped together. Follow the steps outlined below to store multiple document versions, document sets and file attachments grouped together in the file system / file share.

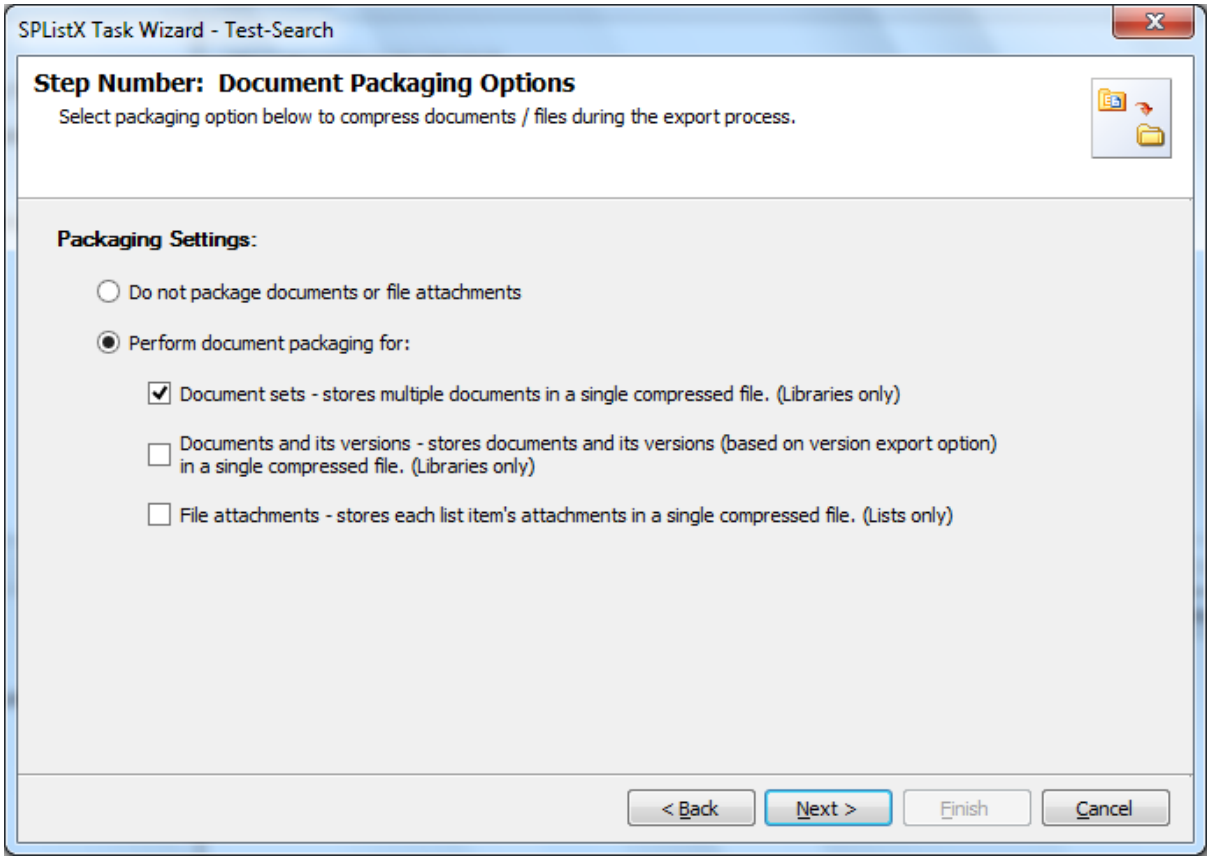
1) The **Document Packaging** Options step appears as shown below:


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

2) Select **Packaging Settings** from the options outlined below:

a) Do not package documents or file attachments: SPListX will not package the exported documents or file attachments.

b) Perform document packaging for: Document package will be created for each exported document set, file version and file attachment based on the option selected below. If the file already exists in the package, File Settings options will be applied.


SPListX Task Wizard - Test-Search
Step Number: Document Packaging Options
Select packaging option below to compress documents / files during the export process.
Packaging Settings:
Do not package documents or file attachments
Perform document packaging for:
Document sets - stores multiple documents in a single compressed file. (Libraries only)
Documents and its versions - stores documents and its versions (based on version export option) in a single compressed file. (Libraries only)
File attachments - stores each list item's attachments in a single compressed file. (Lists only)
< Back
Next >
Finish
Cancel

i. Document sets - This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.

ii. Documents and its versions - This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in Versions Settings wizard step.

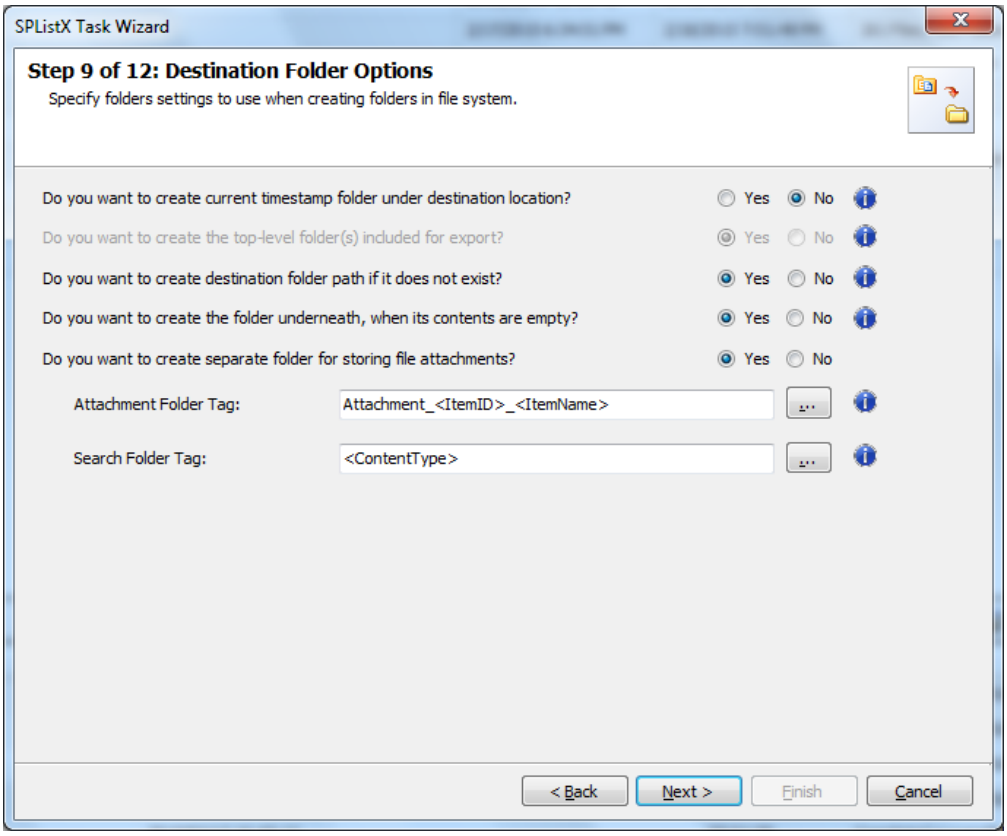
iii. File Attachments - This option will package each list item's attachment(s) into a single compressed file. The compressed package is created in the name of listitem ID.

3) Click **Nex**t to Proceed to the Next Step.

5.1.10 Destination Folder Options

SPListX will create destination folders based on the following options given below:

1) **The Destination Folder options** specification wizard step appears as shown below:


SPListX Task Wizard
Step 9 of 12: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
Search Folder Tag:
<ContentType>
< Back
Next >
Finish
Cancel

2) **Select from the following options:**

   a) **Do you want to create current timestamp folder under destination location? -** This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).

   b) **Do you want to create top-level folder(s) included for export? -** The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

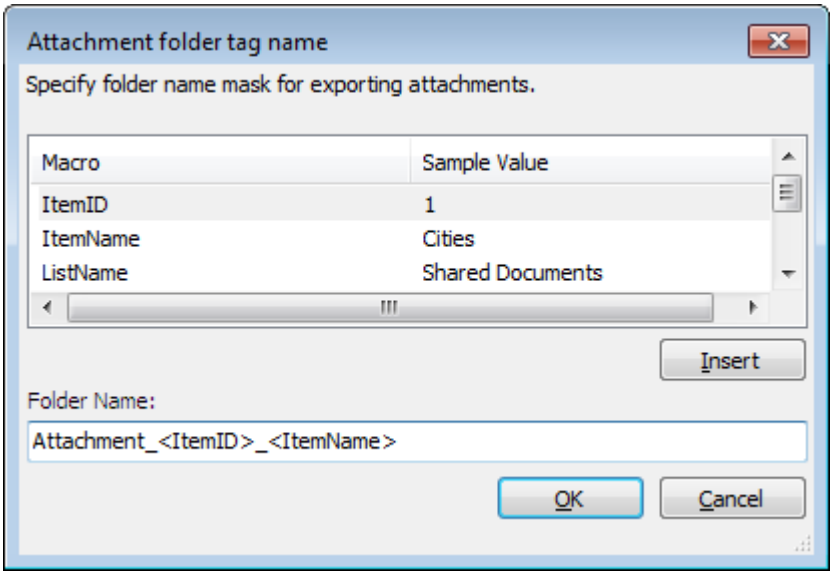
c) **Do you want to create destination folder path if it does not exist? -** This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) **Do you want to create the folder underneath, when its contents are empty? -** This option creates the folder in the destination location, if the source folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

e) **Do you want to create separate folder for storing file attachments? -** This option creates separate folder for storing file attachments under the specified destination location by selecting the option (yes/No).

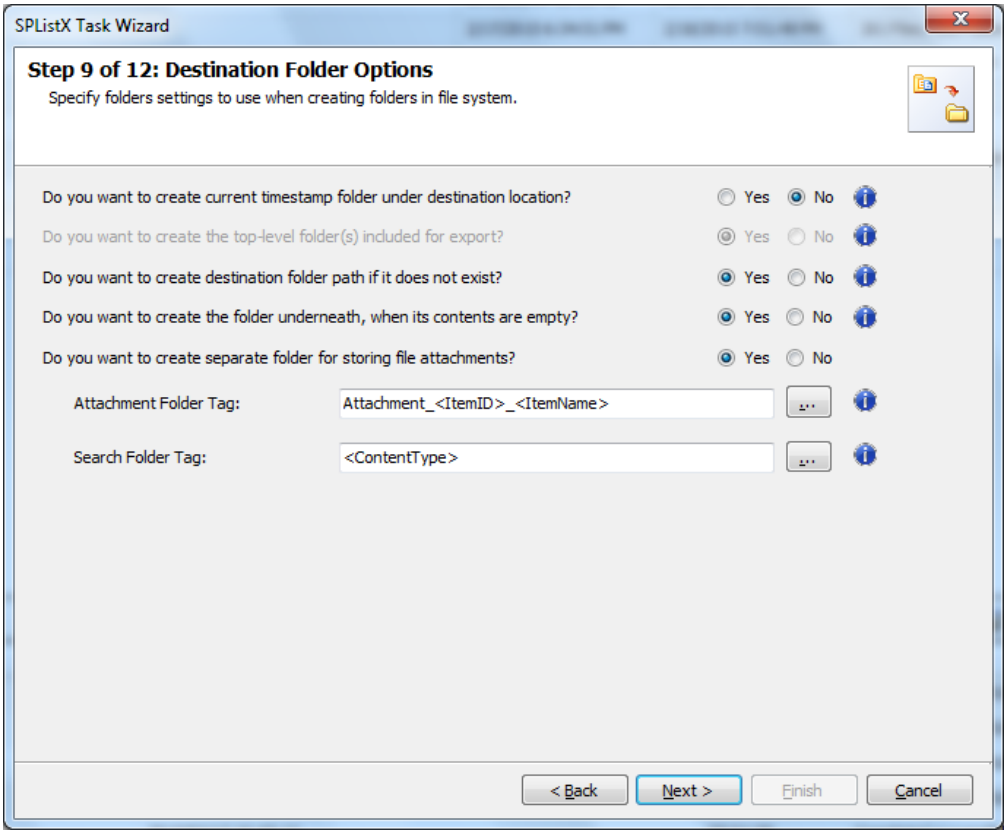
3) You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in

attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.


SPListX Task Wizard
Step 9 of 12: Destination Folder Options
Specify folders settings to use when creating folders in file system.
Do you want to create current timestamp folder under destination location?
Yes
No
Do you want to create the top-level folder(s) included for export?
Yes
No
Do you want to create destination folder path if it does not exist?
Yes
No
Do you want to create the folder underneath, when its contents are empty?
Yes
No
Do you want to create separate folder for storing file attachments?
Yes
No
Attachment Folder Tag:
Attachment_<ItemID>_<ItemName>
Search Folder Tag:
<ContentType>
< Back
Next >
Finish
Cancel

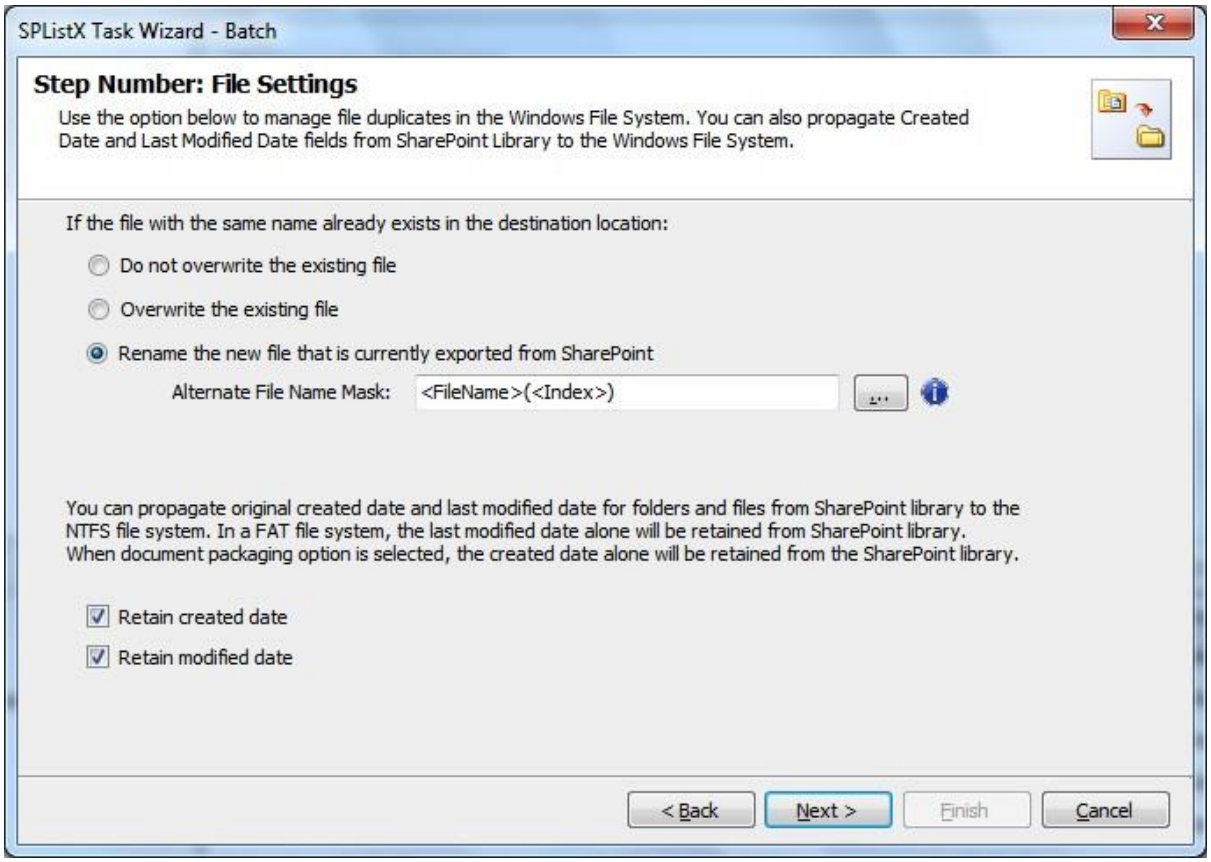
4) Click **Next** to proceed.

5.1.11 File Settings

To construct Alternate File Mask and to propagate created Date and Modified Date from SharePoint Library to Windows File System, use below options:

1) Alternate File Name Mask

If the file with the same name already exists in the destination location, follow the steps outlined below:

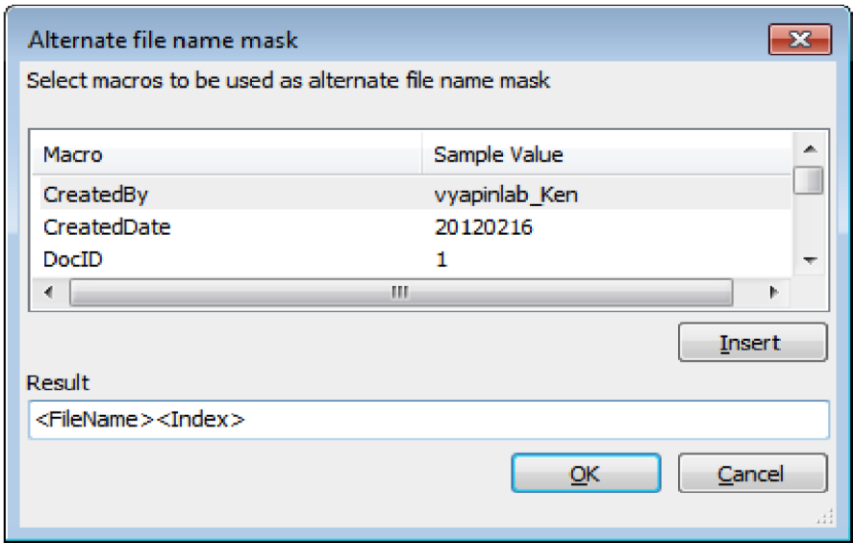

SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

a) Do not overwrite the existing file - Skips the file without overwriting the existing file with the same name.

b) Overwrite the existing file - Deletes the file from the destination location and exports the current source file.

c) Rename the new file that is currently exported from SharePoint - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

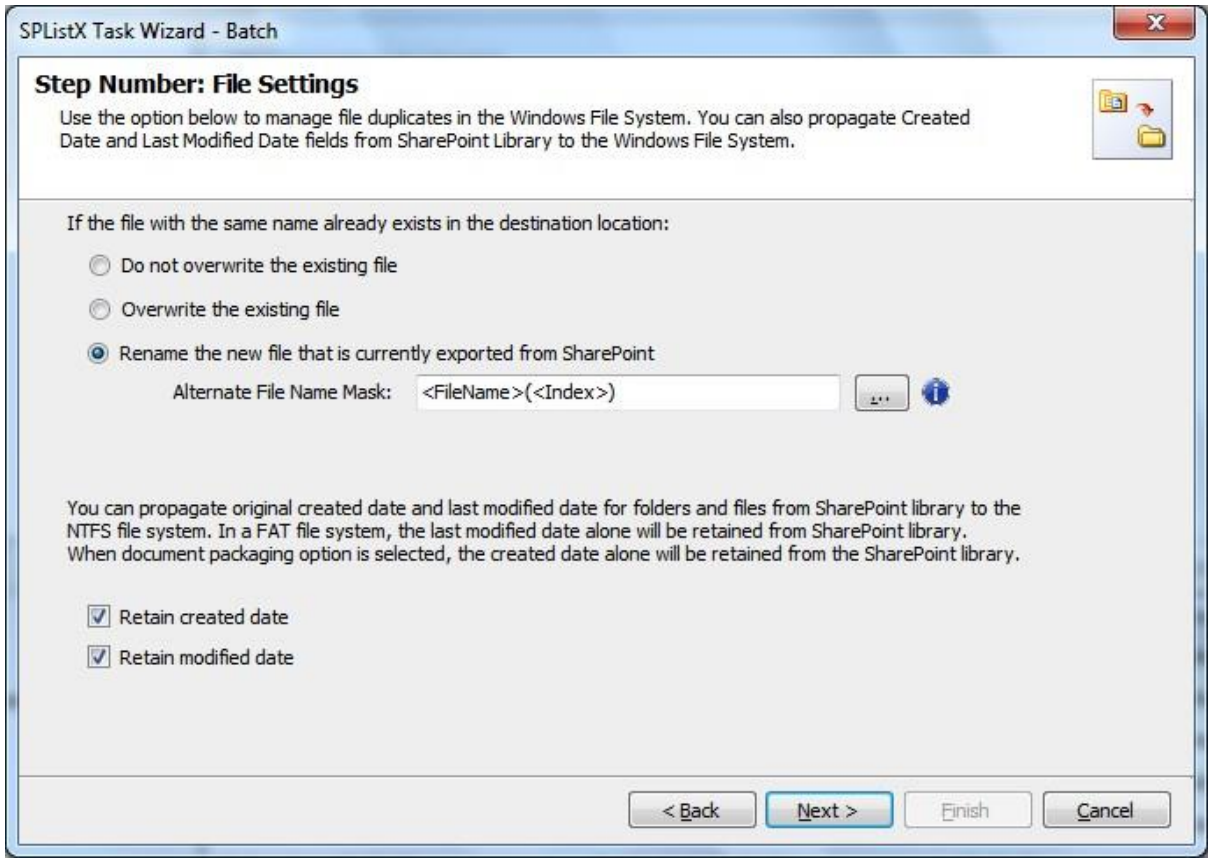
To select alternate file naming mask, click the **alternate file name mask** button placed next to the alternate file name mask textbox. **Alternate file name mask dialog** appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. Click OK to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:


SPListX Task Wizard - Batch
Step Number: File Settings
Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.
If the file with the same name already exists in the destination location:
Do not overwrite the existing file
Overwrite the existing file
Rename the new file that is currently exported from SharePoint
Alternate File Name Mask:
<FileName>(<Index>)
You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library.
When document packaging option is selected, the created date alone will be retained from the SharePoint library.
Retain created date
Retain modified date
< Back
Next >
Finish
Cancel

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

a) **Retain created date -** Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.

b) **Retain modified date -** Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

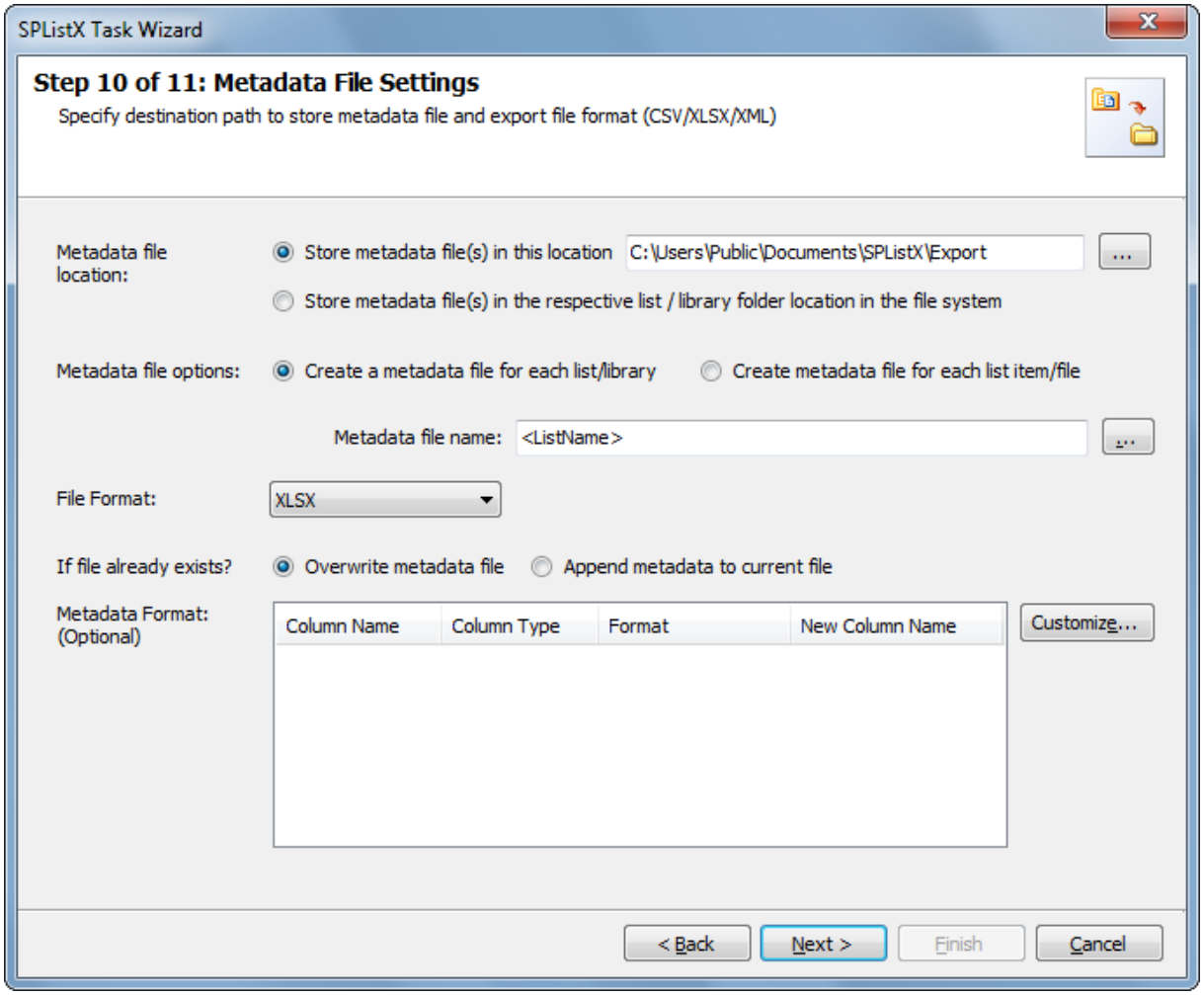
NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

3) Click **Next** to Proceed.

5.1.12 Metadata File Settings

SPListX will create metadata files based on the following options given below:

1) The **Metadata File Settings** step appears as shown below:


SPListX Task Wizard
Step 10 of 11: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)
Metadata file location:
Store metadata file(s) in this location
C:\Users\Public\Documents\SPListX\Export
Store metadata file(s) in the respective list / library folder location in the file system
Metadata file options:
Create a metadata file for each list/library
Create metadata file for each list item/file
Metadata file name:
<ListName>
File Format:
XLSX
If file already exists?
Overwrite metadata file
Append metadata to current file
Metadata Format: (Optional)
Column Name
Column Type
Format
New Column Name
Customize...
< Back
Next >
Finish
Cancel

2) Specify the **Metadata filename & location** using the options below:

a) Store metadata file(s) in this location: Specify a folder path where the selected list items metadata are to be exported. You can also Click browse ('...') button to launch folder browser dialog.

b) Store metadata file(s) in the respective list / library folder location in the file system: - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

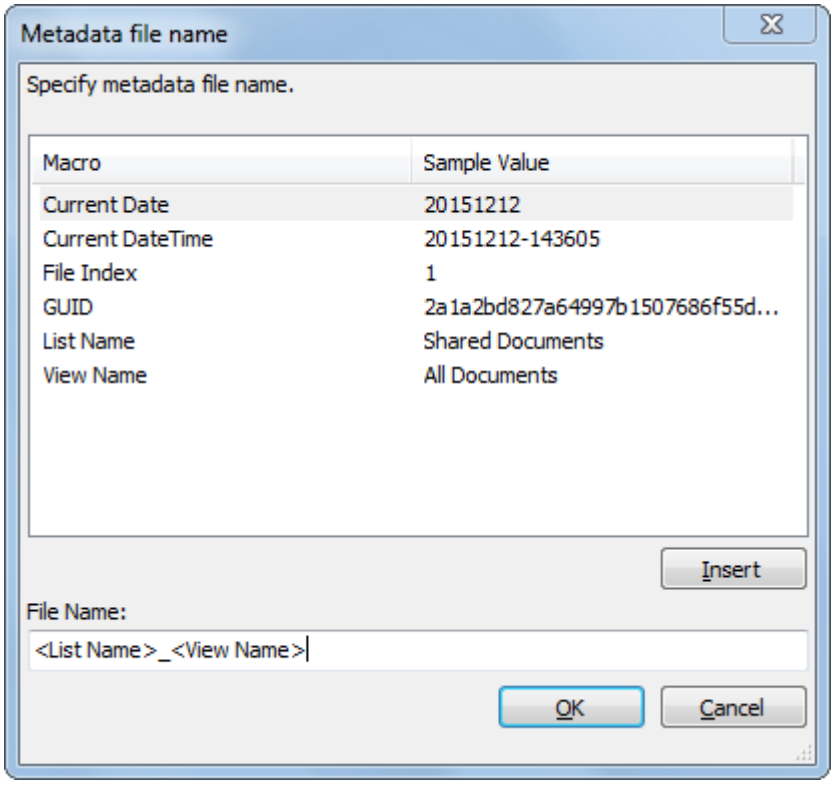
NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

3) Specify the Metadata file options using the options below:

e) **Create a metadata file for each list/library:** This option will export the metadata for the entire list/library in a single file.
f) **Create metadata file for each list item/file:** This option will export separate metadata file for each list item or file.

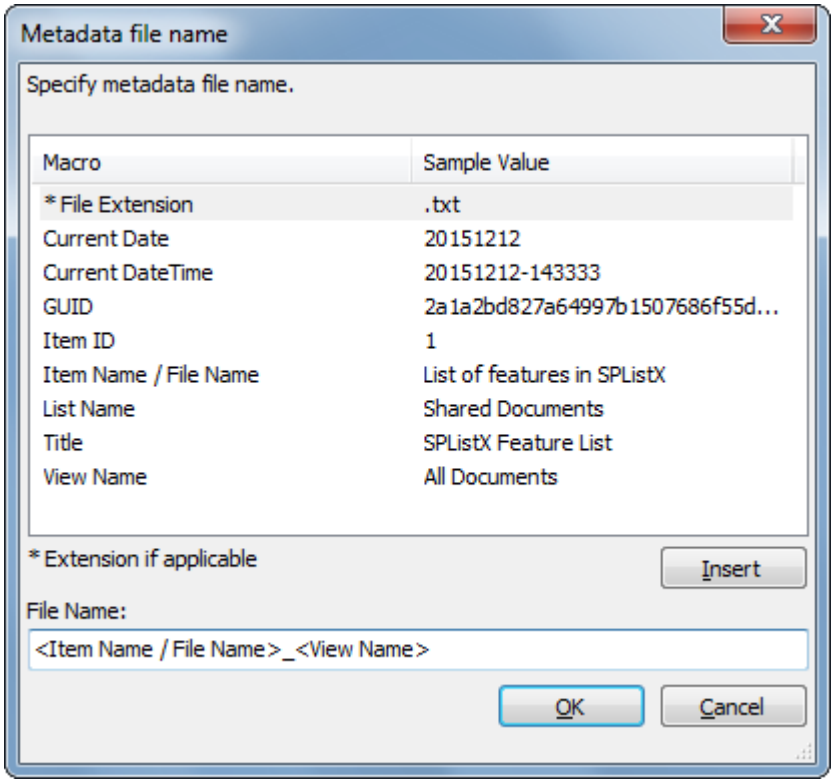
4) When you select Create a metadata file for each list/library option, SPListX creates the metadata file using the List name.

To create a unique metadata file name, click the (...) button placed next to the metadata file name textbox. Metadata file name dialog appears as shown below:



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

5) When you select **Create metadata file for each list item/file option**, SPListX creates the metadata file using the Item name.



Construct metadata file name with the available built-in macros provided in the dialog. Click OK to close the dialog. The file name will be created in the name format / syntax entered in the dialog.

*** Note: ViewName** macro is applicable only for View based export. SPListX will substitute the name of the processed view wherever applicable.

In view based export,

For list / library entries and for files / folders within them, it appends the view name.

For file / folder entries provided for export, it appends "All Items" instead of the view name.

e.g., List of features in SPListX_All Items.xlsx

6) Specify the Metadata file format using the options below:

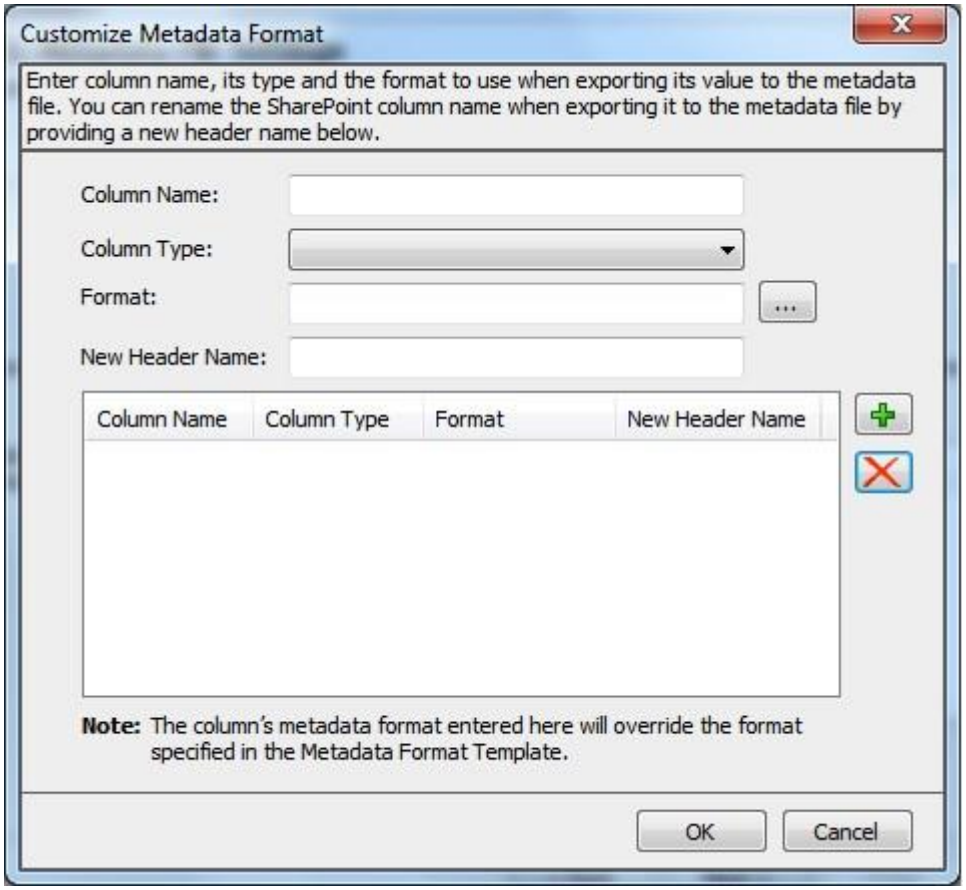
a. **CSV**
b. **XSLX**
c. **XML***
d. **XML with DTD***

7) If the metadata file already exists in the destination location, choose from any one of the following options:

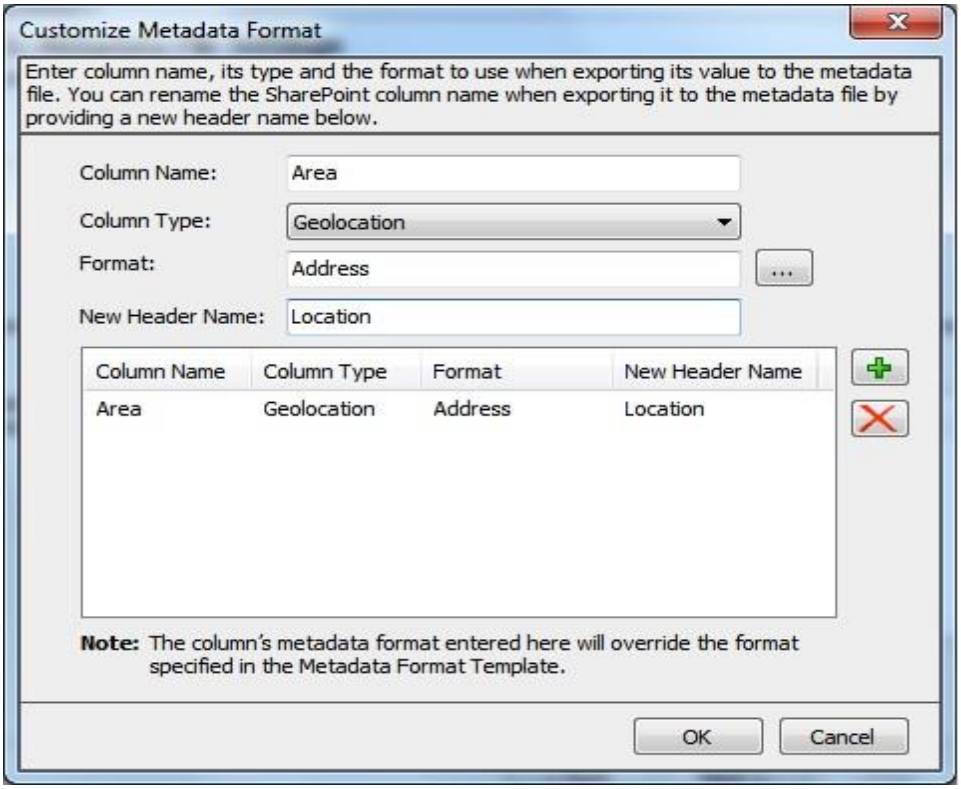
a) Overwrite: This option will overwrite the existing metadata file.

b) Append: This option will append the new metadata to the existing metadata file. The new metadata will be shown in the new sheet with the name of current timestamp in XLSX file.

8) You can specify a new metadata custom format based on the column name when generating the metadata file. The format specified here overrides the application level template defined in **Metadata Format Template** tool. Also, you can specify new column names to use when generating the metadata file in the file system location. To use this feature, click the Edit button. A **Customize Metadata Format** Dialog appears as shown below:


Customize Metadata Format
Enter column name, its type and the format to use when exporting its value to the metadata file. You can rename the SharePoint column name when exporting it to the metadata file by providing a new header name below.
Column Name:
Column Type:
Format:
New Header Name:
Column Name
Column Type
Format
New Header Name
Note: The column's metadata format entered here will override the format specified in the Metadata Format Template.
OK
Cancel

9) Specify SharePoint column name in the **Column Name** textbox and select its type from the available **Column Type** from combo box. **Click** ... button to load the available macros. Select format from the available macros. If you want to rename the SharePoint column name when exporting to the metadata file, provide a new name in the **New Header Name** text box. For example, a SharePoint column named 'Area' in the source SharePoint list can be customized and renamed as 'Location' when creating the metadata file during the export operation.



Click to add the SharePoint column name and its format in the custom metadata format list.

Click to remove t he SharePoint column name from the custom metadata format list.

10) Click ***Next*** to Proceed.

<u>* Note:</u>

XML File Format:

SPListX generates an XML file using the filename (using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name) in the stated metadata file location with the metadata information.

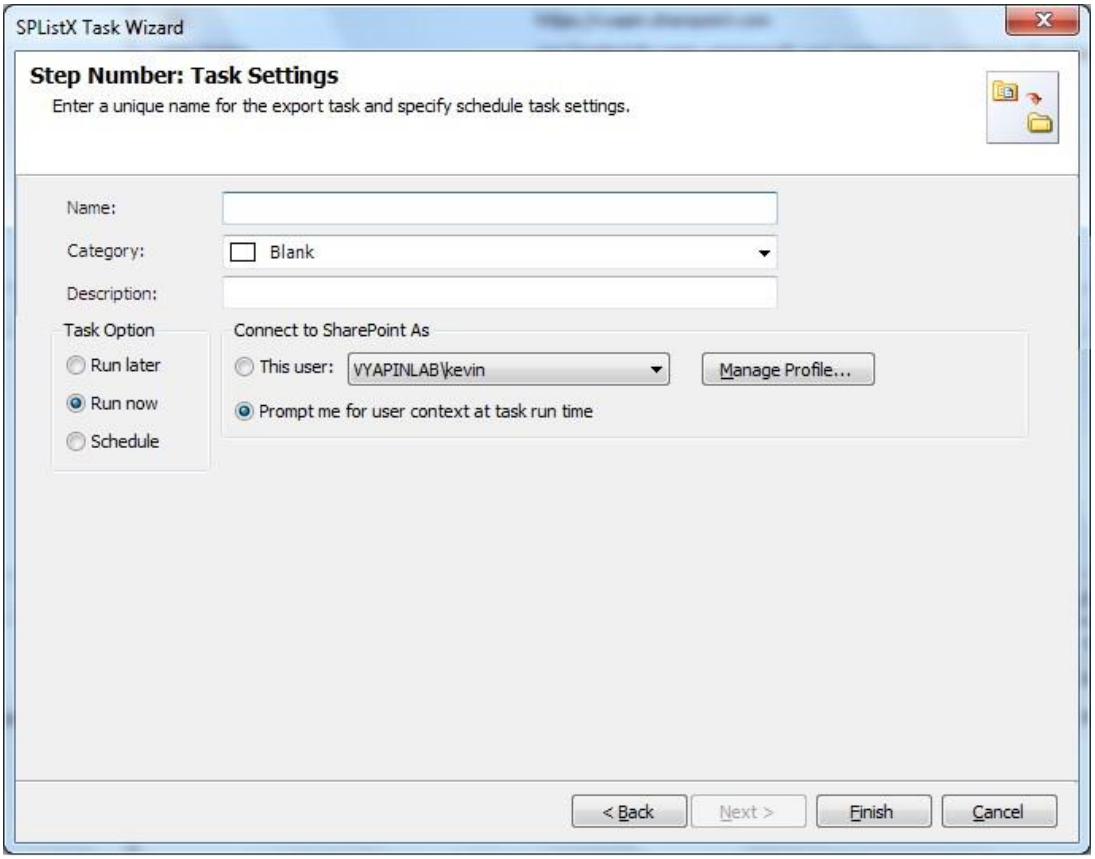
XML with DTD

SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput. XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

5.1.13 Task Settings

To specify the task name and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) The **Task Settings step** appears as shown below:



2) Enter a unique **task name** in Task Name textbox.

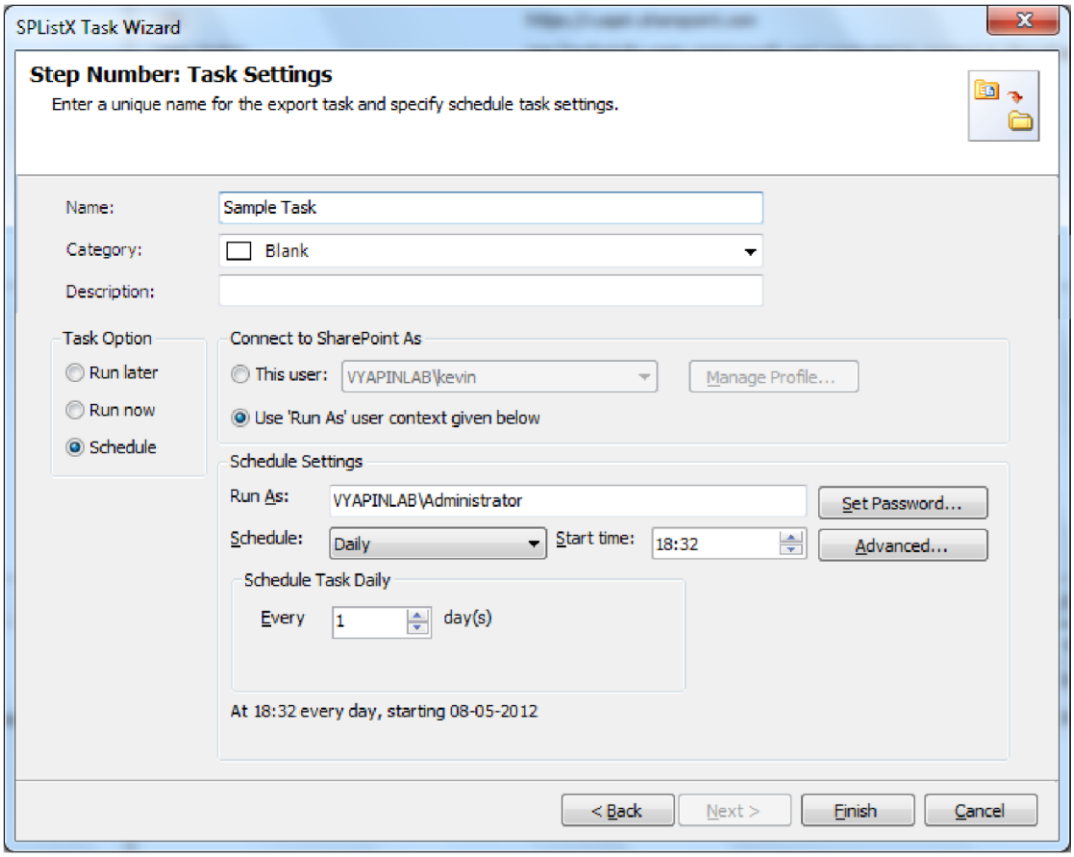
3) Select a **Category** from the Drop-Down List in which the task should be categorized & stored.

4) Enter a **Description** for the export task.

5) Select a **Task Option** from one of the following options:

- **a) Run later -** to run the task later as and when desired
- **b) Run now** - to run the task immediately after clicking Finish button
- **c) Schedule -** to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX

will perform the export based on the *Run As* user account specified in this export wizard step. The *Run As* account should be a valid Windows domain account.



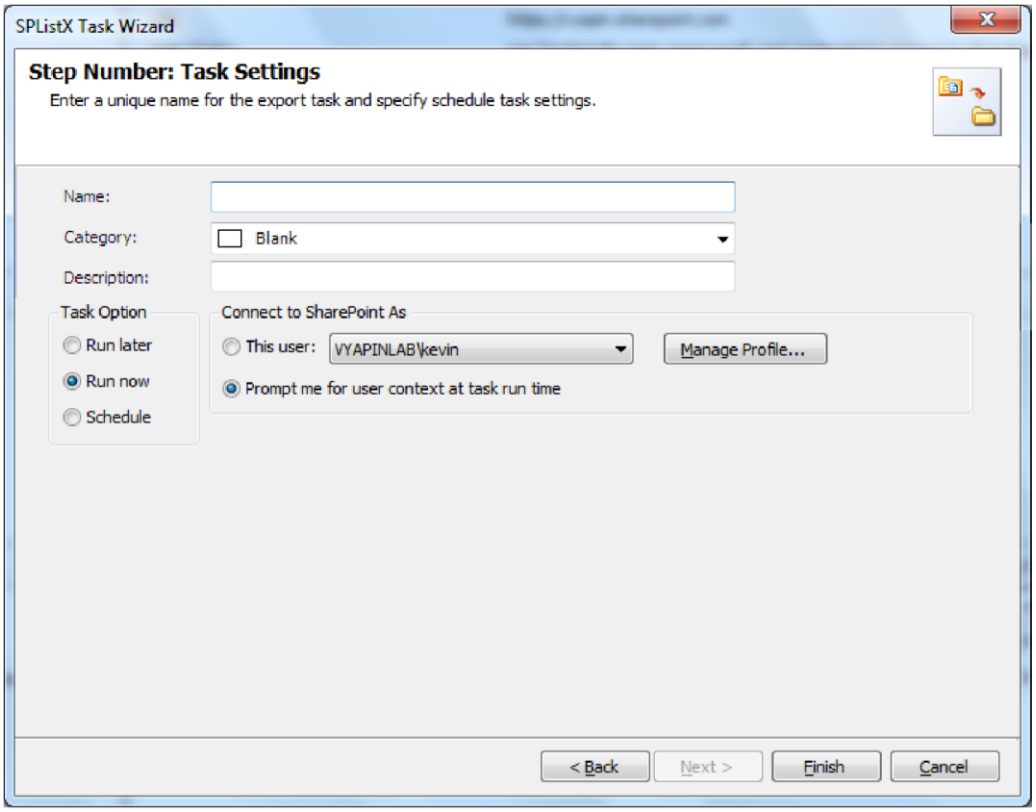
In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

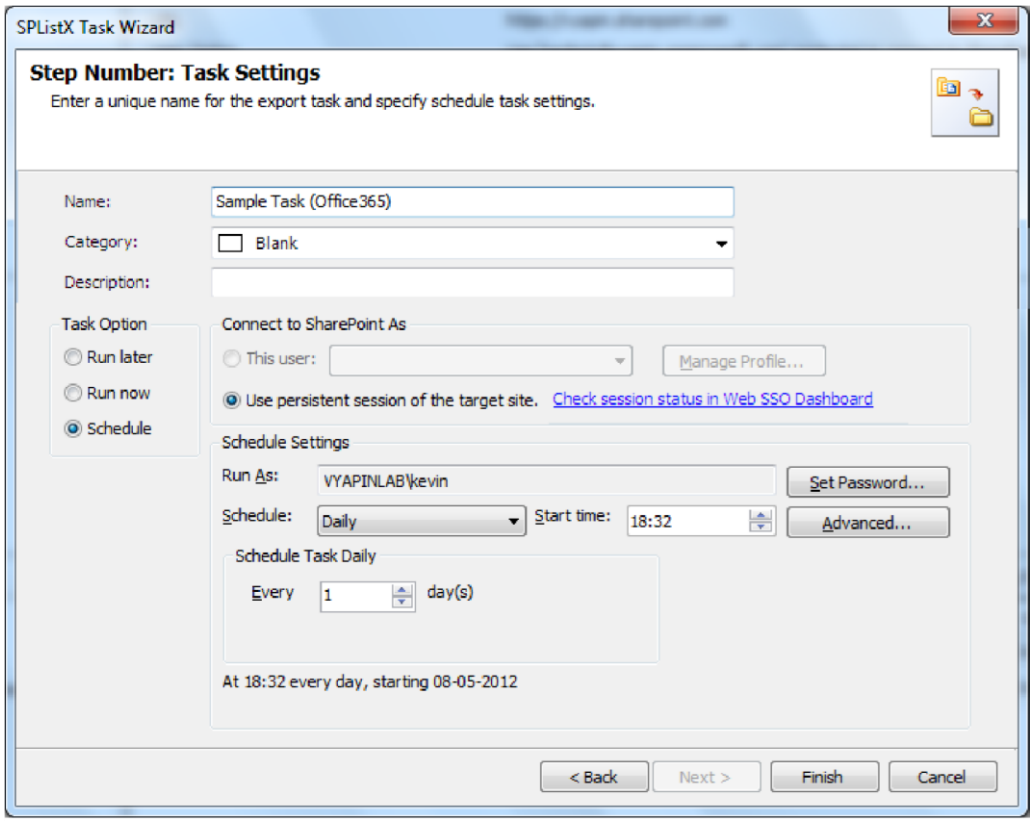
Click **Manage Profile** button to create new user profile.

6) As for **Web Single Sign-on** credential based export task, the task settings will be shown as below:

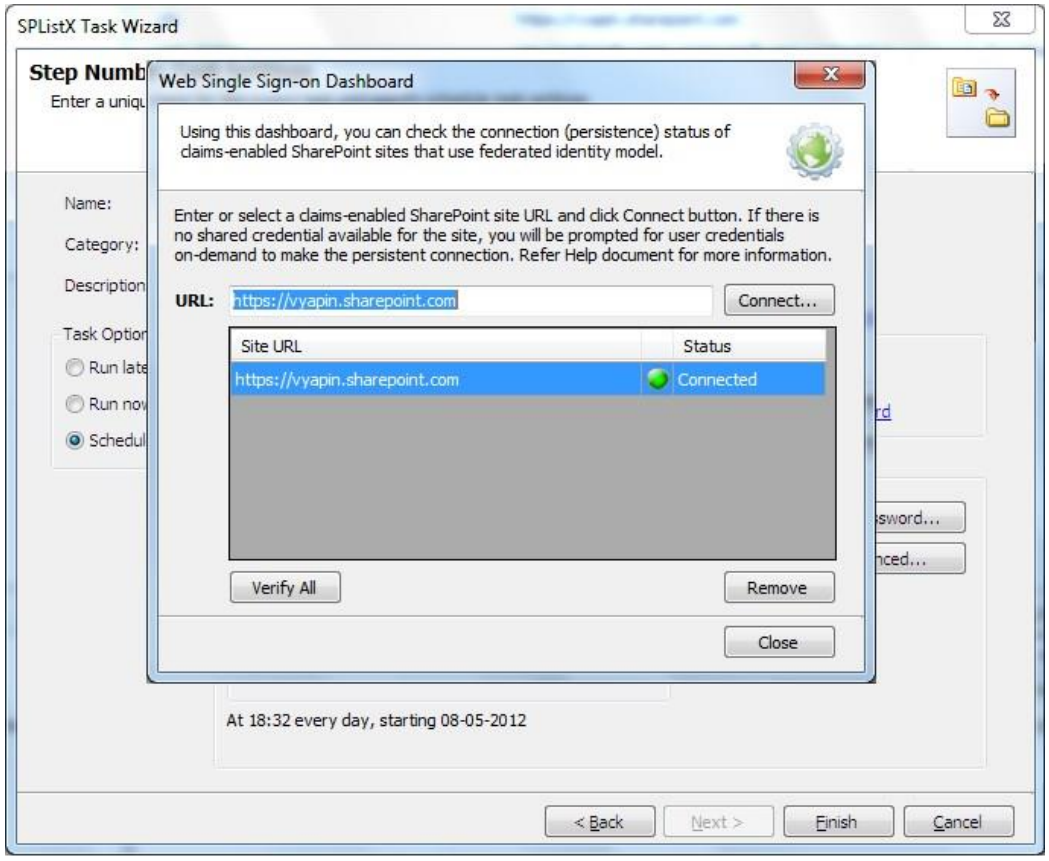


The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

7) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:



8) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, click **Check session status in Web SSO Dashboard** hyperlink.



8) Click **Finish** button to create the task.

5.2 Working With SharePoint Search Results

- SharePoint 2013 Search Results
- SharePoint 2010 Search Results
- SharePoint 2007 Search Results

5.2.1 SharePoint 2013 Search Results

Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment.

Protocol handler that crawls the SharePoint content will not populate ows_created_x0020_Date (Text) crawled property.

1) **How to map CreatedDate field to crawled field?**
   - Open Central Administration, in the **Application Management** section, and click **Manage service applications.**
   - Click the Search service application for which you are viewing managed and crawled properties.
   - On the Search Administration page, in the Quick Launch, under **Queries and Results**, click **Search Schema.**
   - On the Metadata Property Mappings page, click New Managed Property.
   - On the New Managed Property page, in the Property name box in the Name and type section, type the name of the new managed property.
   - In the Description box, type a description of the property.
   - Under The type of information in this property, select one of the following options for the property:
   - Under **The type of information in this property Text** type ➢ Check **Queryable, Retrievable, Refinable** properties.
   - In the **Mappings to crawled properties** section, select Include **content from the first crawled property that is not empty, based on the specified order**
   - Click **Ok**

Use this page to view, create, or modify the settings of this managed property. Note that the settings that you can adjust depend on your current authorization level.

Name and description

Name and optional description for this property.

Property name:

Created

Description:

Type

Type of information that is stored in this property.

The type of information in this property:

- ○ Text
- ○ Integer
- ○ Decimal
- ◉ Date and Time
- ○ Yes/No
- ○ Double precision float
- ○ Binary

Main characteristics

Searchable:
Enables querying against the content of the managed property. The content of this managed property is included in the full-text index. For example, if the property is "author", a simple query for "Smith" returns items containing the word "Smith" and items whose author property contains "Smith".

☐ Searchable

Queryable:
Enables querying against the specific managed property. The managed property field name must be included in the query, either specified in the query itself or included in the query programmatically. If the managed property is "author", the query must contain "author:Smith".

☑ Queryable

Retrievable:
Enables the content of this managed property to be returned in search results. Enable this setting for managed properties that are relevant to present in search results.

☑ Retrievable

Allow multiple values:
Allow multiple values of the same type in this managed property. For example, if this is the "author" managed property, and a document has multiple authors, each author name will be stored as a separate value in this managed property.

☐ Allow multiple values

Refinable:
Yes - active: Enables using the property as a refiner for search results in the front end. You must manually configure the refiner in the web

Refinable: Yes - active

Mappings to crawled properties

The list shows all the crawled properties that are mapped to this managed property. A managed property can get its content from one or more crawled properties.

○ Include content from all crawled properties

◉ Include content from the first crawled property that is not empty, based on the specified order

Office:12
Basic:15

Mappings to crawled properties

Move Up
Move Down
Add a Mapping
Remove Mapping

2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

During frequent usage of SharePoint, SharePoint Search services cannot serve the search request within the stipulated time therefore; SharePoint search server itself throws a System.ServicepProcess.TimeoutException. To avoid this exception, we strongly recommend you to perform search export process during off-peak hours.

4) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

5) How to view duplicate search results in SharePoint 2013?

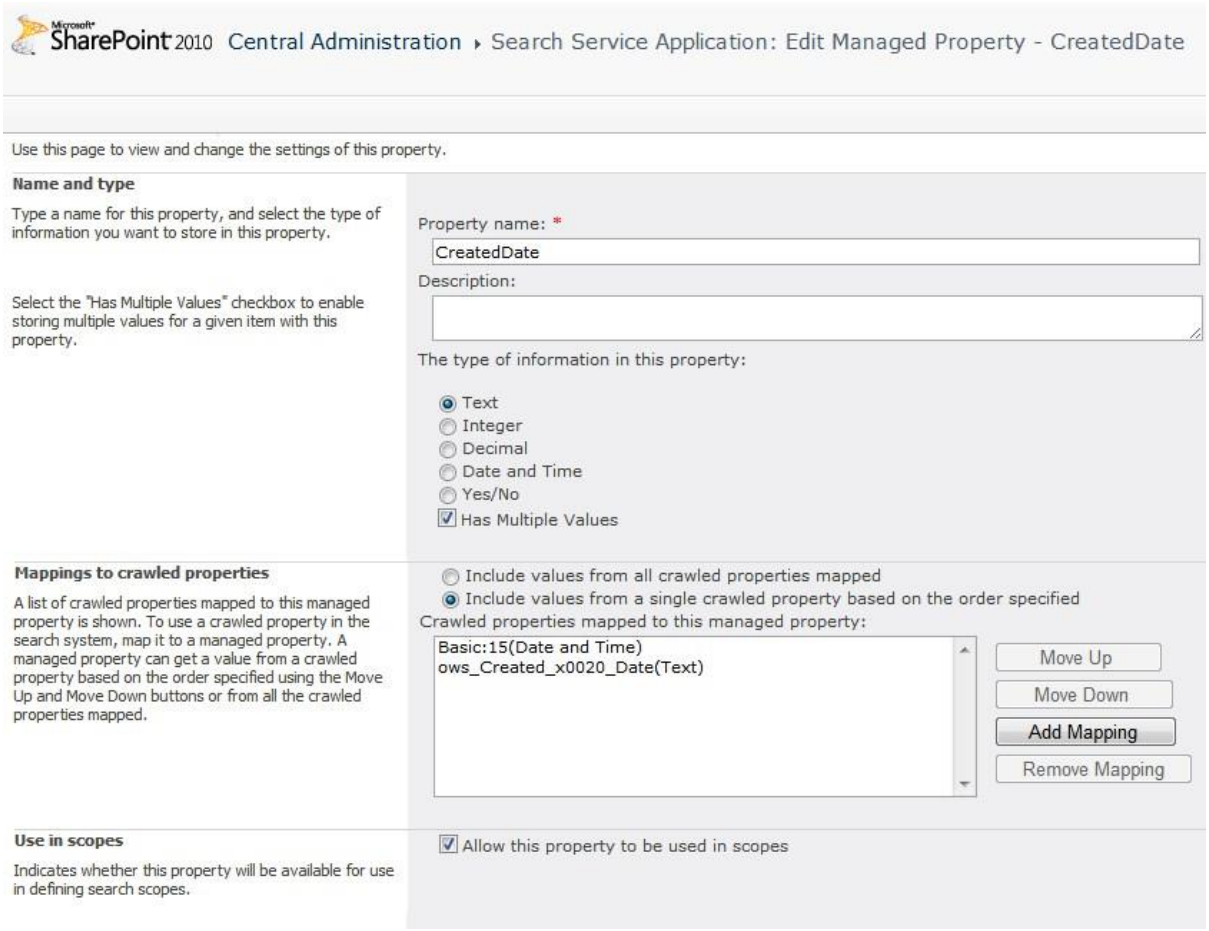
- Go to the search page; enter any query to return the search results page. For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part
- In the task pane that appears on the right hand side, under 'Settings', check the box labelled ' Show view Duplicates links’.

5.2.2 SharePoint 2010 Search Results

Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment.

Protocol handler that crawls the SharePoint content will not populate ows_created_x0020_By (Text) crawled property.

1) **How to map CreatedDate field to crawled field?**
   - Open Central Administration, in the **Application Management** section, click **Manage service applications.**
   - Click the Search service application for which you are viewing managed and crawled properties.
   - On the Search Administration page, in the Quick Launch, under **Queries and Results**, click **Metadata Properties.**
   - On the Metadata Property Mappings page, click New Managed Property.
   - On the New Managed Property page, in the Property name box in the Name and type section, type the name of the new managed property.
   - In the Description box, type a description of the property.
   - Under The type of information in this property, select one of the following options for the property:
   - Under **The type of information in this property** Text type
   - In the **Mappings to crawled properties** section, select **Include values from a single crawled property based on the order specified** ➢ Click **Ok**


SharePoint 2010 Central Administration ▸ Search Service Application: Edit Managed Property - CreatedDate
Use this page to view and change the settings of this property.
Name and type
Type a name for this property, and select the type of information you want to store in this property.
Select the "Has Multiple Values" checkbox to enable storing multiple values for a given item with this property.
Property name: *
CreatedDate
Description:
The type of information in this property:
Text
Integer
Decimal
Date and Time
Yes/No
Has Multiple Values
Mappings to crawled properties
A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.
Include values from all crawled properties mapped
Include values from a single crawled property based on the order specified
Crawled properties mapped to this managed property:
Basic:15(Date and Time)
ows_Created_x0020_Date(Text)
Move Up
Move Down
Add Mapping
Remove Mapping
Use in scopes
Indicates whether this property will be available for use in defining search scopes.
Allow this property to be used in scopes

2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

During frequent usage of SharePoint, SharePoint Search services cannot serve the search request within the stipulated time therefore; SharePoint search server itself throws a System.ServicepProcess.TimeoutException. To avoid this exception, we strongly recommend you to perform search export process during off-peak hours.

4) How stemming will help you to get related search results?

Stemming will bring back words closely related to the query terms i.e. inflectional variants for most languages, but for some languages derivational variants as well.

For example, sample search queries with search results.

S.No.	Search Keywords	Search Results
1.	Run	In addition to exact match, it will bring back matches on "runs", "ran", "running".
2.	Page	In addition to exact match, it will bring back matches on "pages", "paged", and "paging".

5) How to enable stemming in SharePoint 2010?

- Go to the search page; enter any query to return the search results page.

  For ex: enter keyword 'sharepoint' in anykeywords text box.
- Under Site Actions, select 'Edit page'.
- Locate the 'Search Core Results' web part (usually in the bottom zone).
- From the Edit button, select 'Modify shared web part.
- In the task pane that appears on the right hand side, under 'Results Query Options', select 'Enable Search Term Stemming' checkbox.

NOTE: If stemming is switched on, it will increase your index size and potentially impact search performance.

6) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

7) How to view duplicate search results in SharePoint 2010?

- Go to the search page; enter any query to return the search results page.

  For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part
- In the task pane that appears on the right hand side, under 'Results Query Options', check the box labelled ' Remove Duplicate Results '.

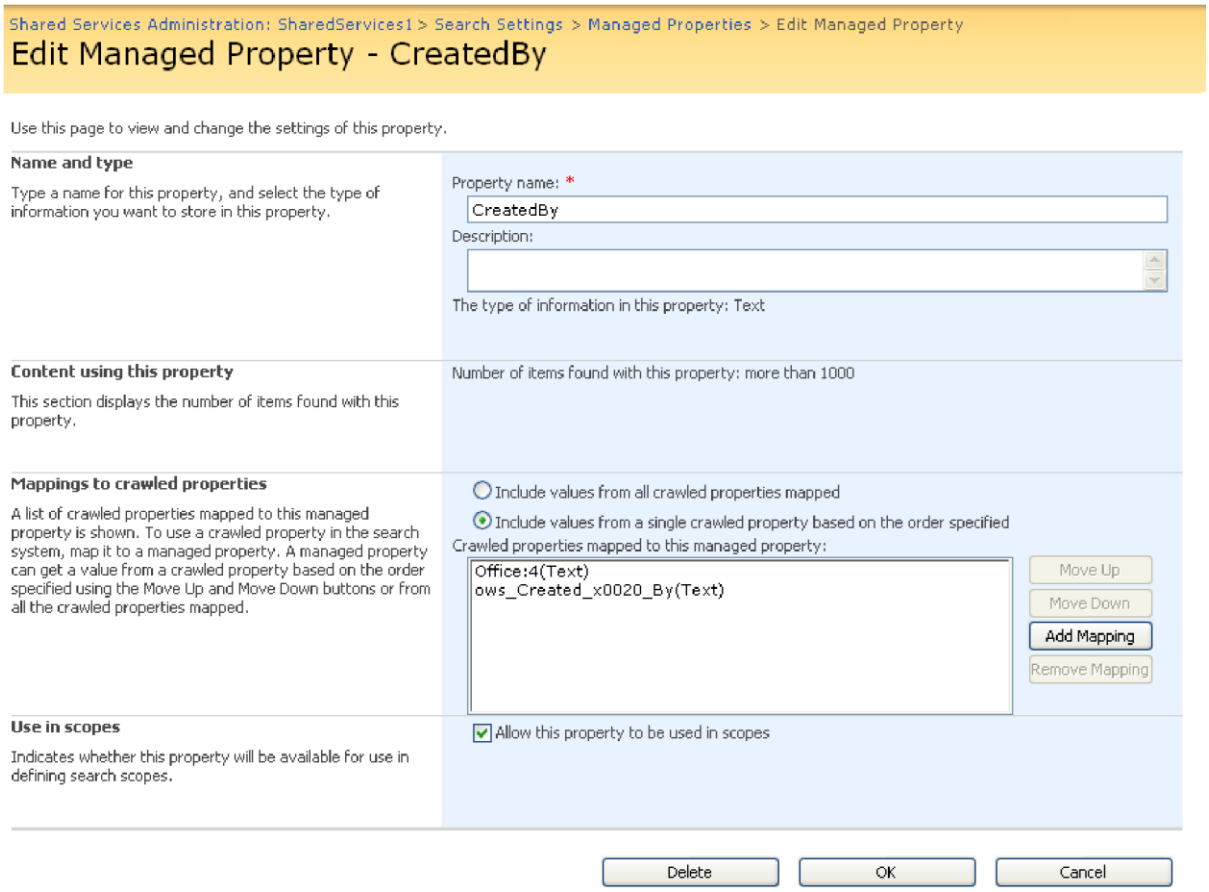
5.2.3 SharePoint 2007 Search Results

Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment

Protocol handler that crawls the SharePoint content will not populate ows_Modified_x0020_By (Text) or the ows_ModifiedBy(Text), ows_created_x0020_By(Text) crawled property.

1) How to map LastModifiedBy and CreatedBy field to crawled field?

- Open Central administration -> Shared Services -> SharedServicesX (X being the number of the shared services provider for the site you are creating a mapping) > search settings -> metadata property mappings.
- Click **"ModifiedBy"** to edit the properties.
- Make sure "Include values from all crawled properties mapped" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE:8" , click "OK".
- Click "Add Mapping" and select the "ows_Last_x0020_Modified (text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".
- Click **"CreatedBy"** to edit the properties.
- Make sure "Include values from a single crawled property based on the order specified" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE:4" , click "OK"
- Click "Add Mapping" and select the "ows_Created_x0020_By (text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".


Shared Services Administration: SharedServices1 > Search Settings > Managed Properties > Edit Managed Property
Edit Managed Property - CreatedBy
Use this page to view and change the settings of this property.
Name and type
Type a name for this property, and select the type of information you want to store in this property.
Property name: *
CreatedBy
Description:
The type of information in this property: Text
Content using this property
This section displays the number of items found with this property.
Number of items found with this property: more than 1000
Mappings to crawled properties
A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.
Include values from all crawled properties mapped
Include values from a single crawled property based on the order specified
Crawled properties mapped to this managed property:
Office:4(Text)
ows_Created_x0020_By(Text)
Move Up
Move Down
Add Mapping
Remove Mapping
Use in scopes
Indicates whether this property will be available for use in defining search scopes.
Allow this property to be used in scopes
Delete
OK
Cancel

2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

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4) How stemming will help you to get related search results?

Stemming will bring back words closely related to the query terms i.e. inflectional variants for most languages, but for some languages derivational variants as well.

For example, sample search queries with search results.

S.No.	Search Keywords	Search Results
1.	run	In addition to exact match, it will bring back matches on "runs","ran","running".
2.	page	In addition to exact match, it will bring back matches on "pages","paged", and "paging".

5) How to enable stemming in M0SS 2007?

- Go to the search page; enter any query to return the search results page. For ex: enter keyword 'sharepoint' in anykeywords text box.
- Under Site Actions, select 'Edit page'.
- Locate the 'Search Core Results' web part (usually in the bottom zone).
- From the Edit button, select 'Modify shared web part.
- In the task pane that appears on the right hand side, under 'Results Query Options', select 'Enable Search Term Stemming' checkbox.

NOTE: If stemming is switched on, it will increase your index size and potentially impact search performance.

6) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

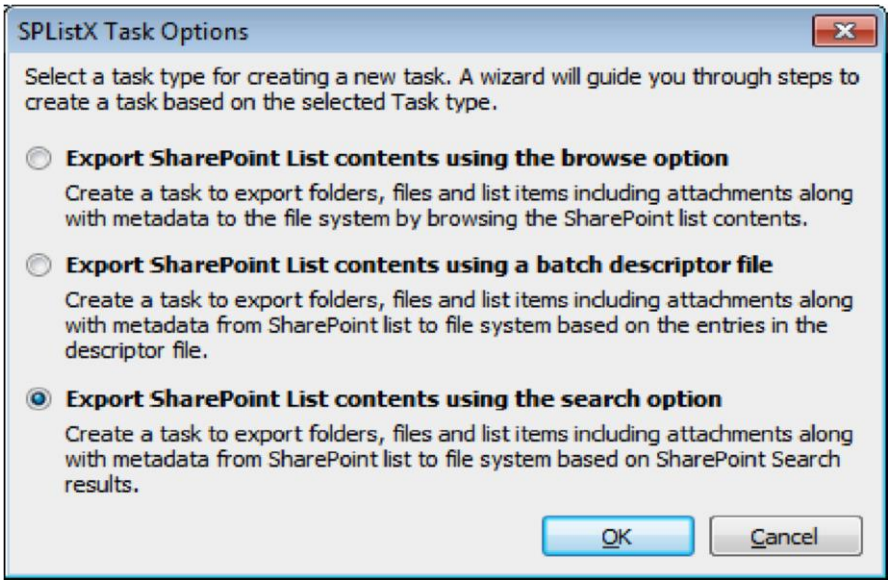
7) How to view duplicate search results in MOSS 2007?

- Go to the search page; enter any query to return the search results page. For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part
- In the task pane that appears on the right hand side, under 'Results Query Options', check the box labelled ' Remove Duplicate Results '.

5.3 How to Create Batch File Using Search Results

Steps for creating batch file using search results

1) Select **Export SharePoint List contents using the search option** in SPListX Task Options dialog as shown below and click **OK**.


SPListX Task Options
Select a task type for creating a new task. A wizard will guide you through steps to create a task based on the selected Task type.
Export SharePoint List contents using the browse option
Create a task to export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
Export SharePoint List contents using a batch descriptor file
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
Export SharePoint List contents using the search option
Create a task to export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint Search results.
OK
Cancel

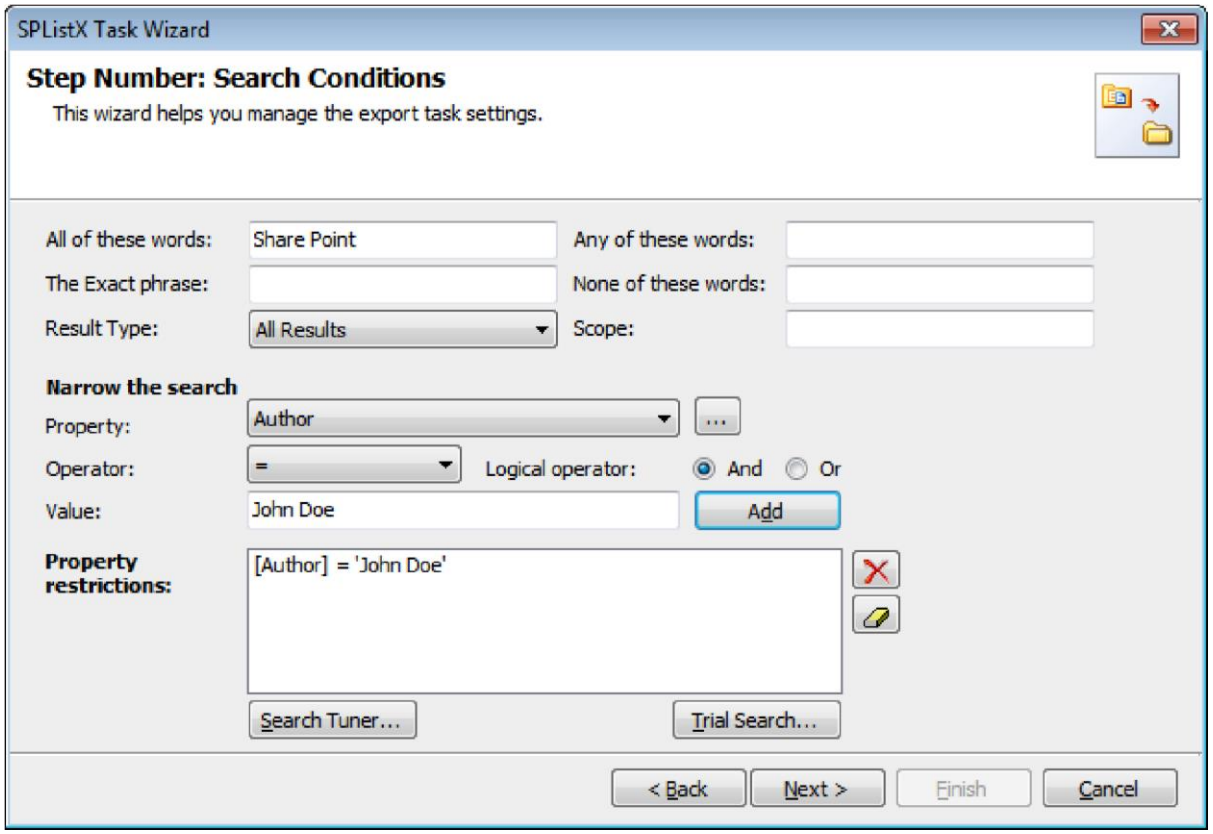
2) **The SPListX Task Wizard** appears as shown below:

SPListX Task Wizard
Step Number: Welcome to SPListX Task Wizard
This wizard helps you manage the export of SharePoint list contents to the file system along with its associated metadata.
Export Option:
Export list contents and metadata
Export SharePoint list contents (folders / files / list item attachments) and its associated metadata to the local file system or network share.
Export list contents (physical files) only
Export SharePoint list contents (folders / files / list item attachments) to the local file system or network share. Metadata will not be exported.
Export metadata only
Export metadata for SharePoint list items to the local file system or network share. Physical files or attachment files will not be exported.
< Back
Next >
Finish
Cancel

Click **Next** button.

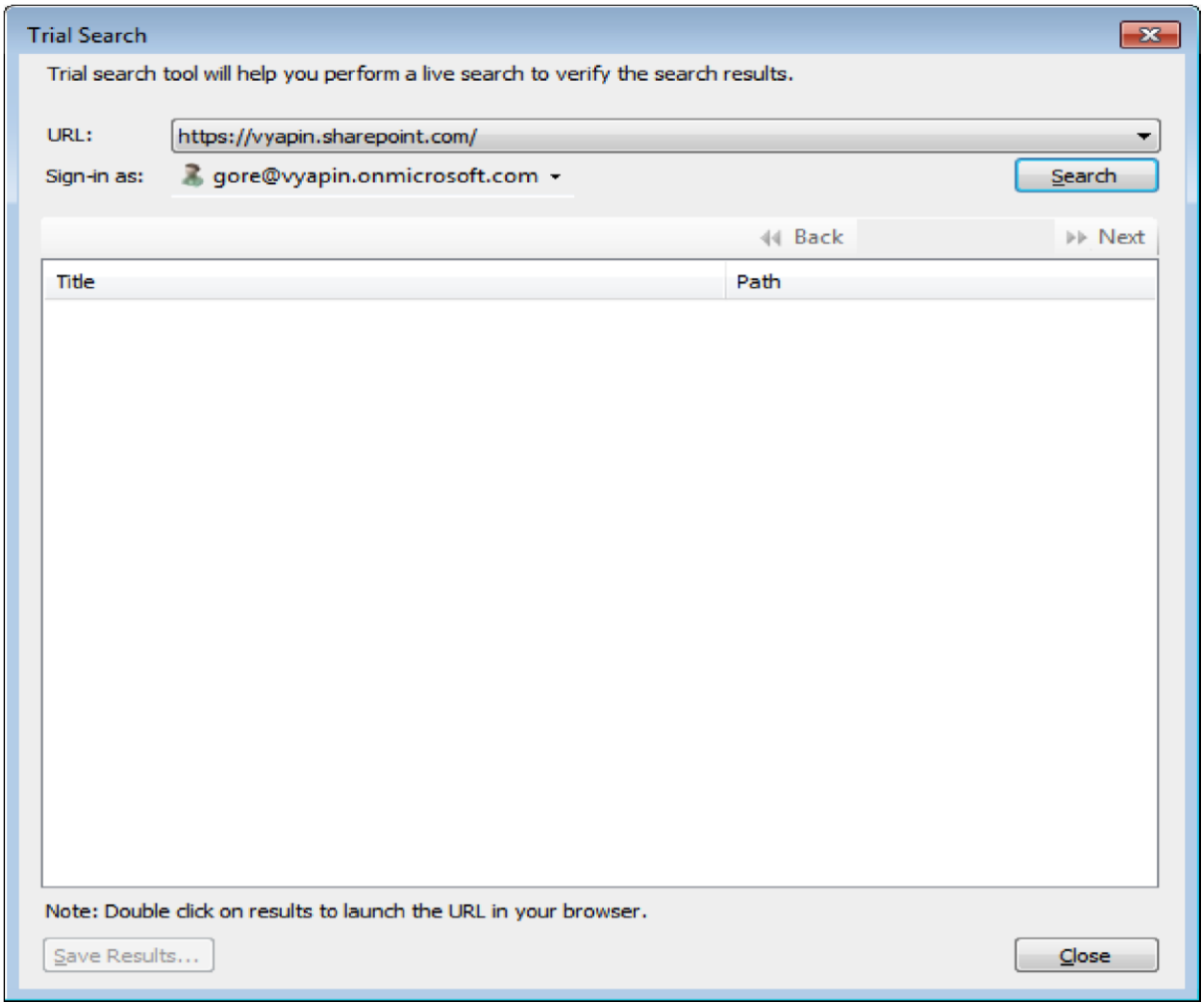
3) Specify **Search URL Settings**

4) Specify **Search Conditions**



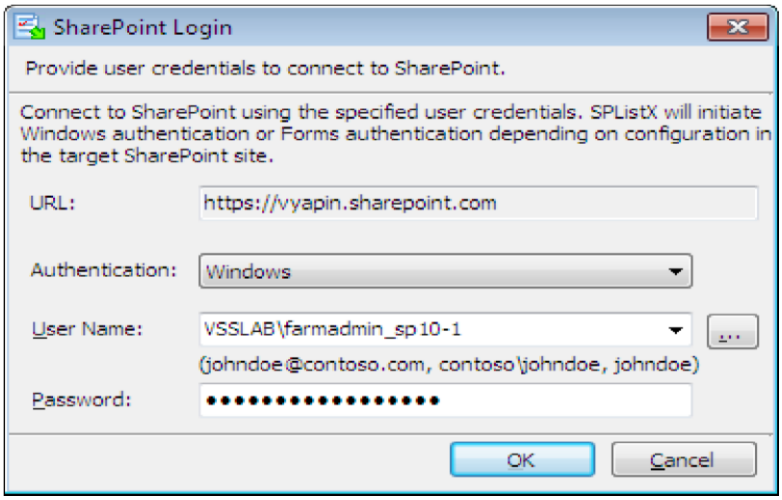
Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the query and help you verify the search results.

The **Trial Search** Dialog appears as shown below:

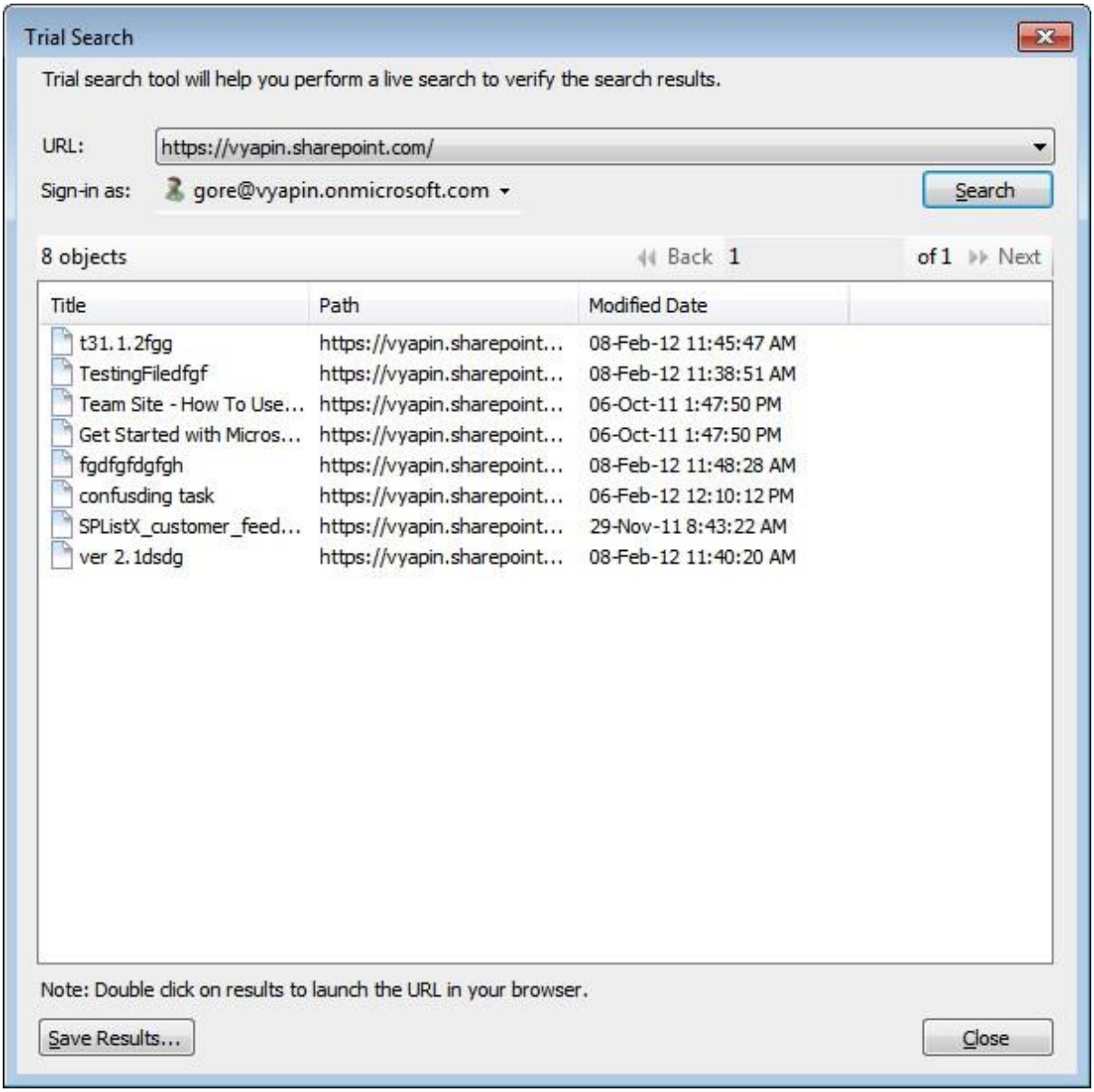


a) Select URL from the **URL** drop-down.

b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

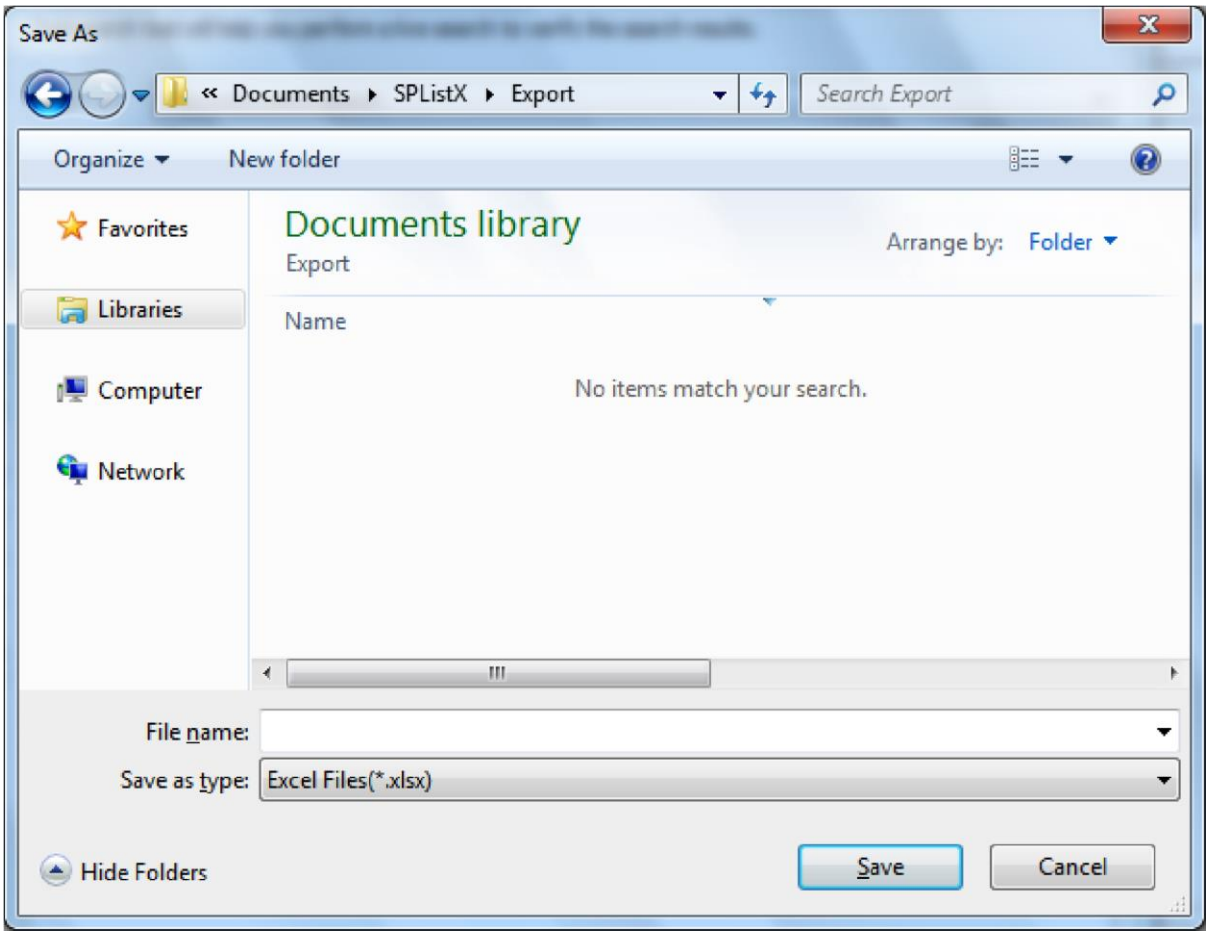


c) Click **Search** button to perform search.



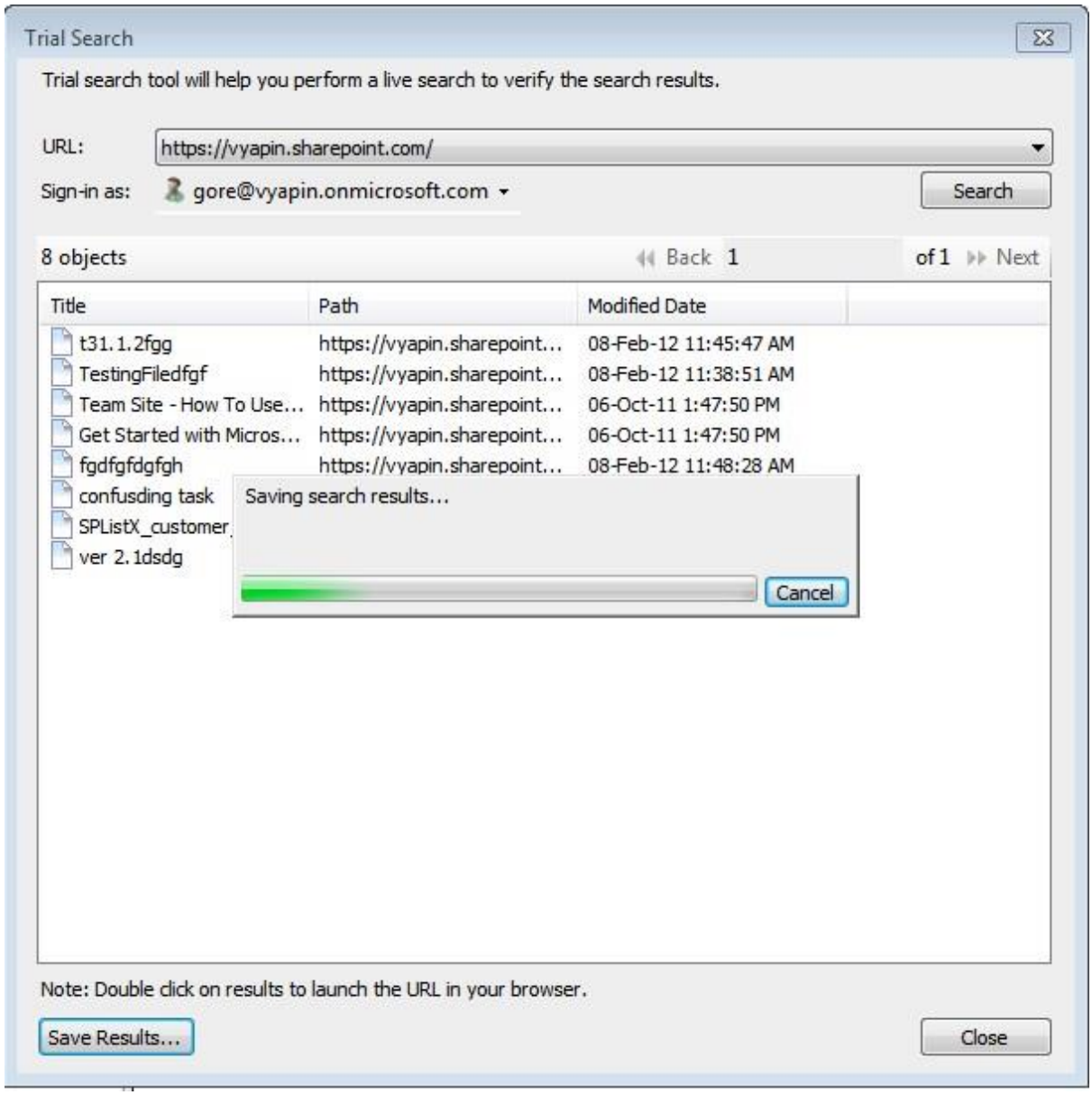
Click **Save Results** button to save the search results.

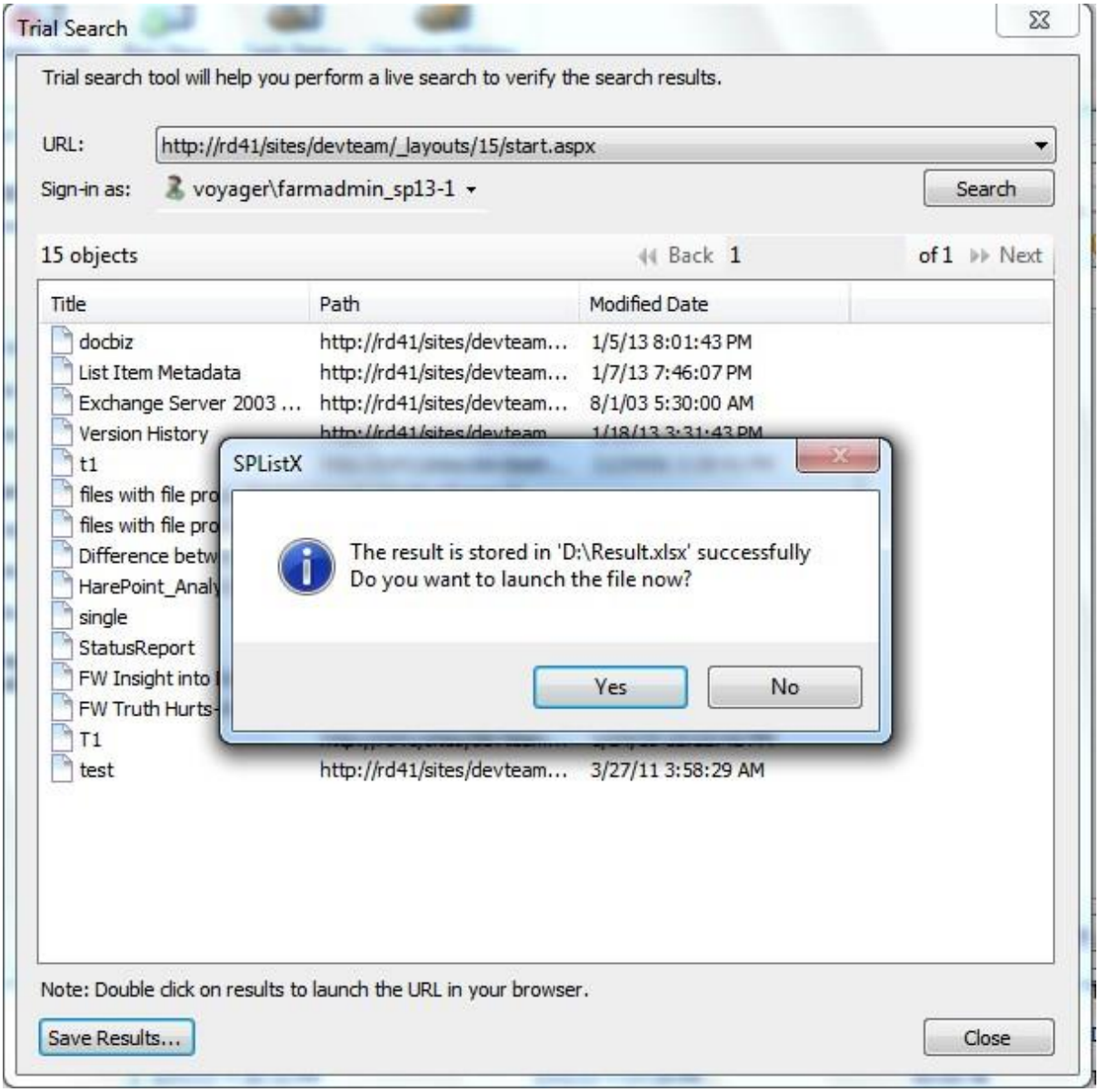
- The **Save As** dialog appears as shown below:



- Specify file name and Click **OK** button.

- While saving search results the **Trial search dialog** appears like this:





Click **yes** to launch the file.

Click **Close** button to close the dialog.

5) **Sample Search Result** format in CSV

"Title", "Path", "Modified Date"

"Purchase","https://vyapin.sharepoint.com/Purchase document/purchase report.xls","2/15/2009"

"Marketing","https://vyapin.sharepoint.com/Purchase document/marketing.ppt","2/15/2009"

"Account Report","https://vyapin.sharepoint.com/Purchase document/Account Report.xls","2/15/2009"

6) Steps to modify the search results.

(i) Remove the Columns modified date, title from the file.

(ii) Add Destination Path Column and specify the file path.

Sample Batch file format for CSV

"Path", "Destination Path"

"https://vyapin.sharepoint.com/Purchase document/purchase report.xls","C:\My Documents"

"https://vyapin.sharepoin.com/Purchase document/marketing.ppt","\\vyapinfs\ExportDocs\shared doc contents"

"https://vyapin.sharepoint.com/Purchase document/Account Report.xls","C:\My Sales\Lists Backup"

7) Create a task to Export SharePoint List contents using a batch descriptor file

6 References

Frequently Asked Questions
Error Messages and Resolution
Troubleshooting
How to uninstall SPListX

6.1 Frequently Asked Questions

For Frequently Asked Questions please click here.

6.1 Error Messages and Resolution

Resolution Tips

You may notice one or more of the error messages given below when using SPListX to connect to SharePoint and perform an export. This is not an exhaustive compilation of all error messages, but an attempt to include as many known error messages and how to resolve the errors. Please refer **Troubleshooting** section for more information.

Error Message	**Resolution**
The remote server returned an error: (407) Proxy Authentication Required.	Enable the **Bypass proxy server for local addresses** option available at **LAN Settings of Internet Options** of Internet Explorer Browser.
Unable to establish existence of the account specified.	The user account specified in the scheduled task should be a trusted domain user account.
Source folder or file not found	Ensure that the given Source Path is valid and available. Invalid or unavailable source paths will result in this error.
Unable to locate list with the specified URL	Ensure that the given source list URL is valid and exists.
Unable to locate destination folder with the specified path	Ensure that the given destination folder location is valid and exists.
The file is checked out or locked for editing by user	This error may occur when reading a file in SharePoint, if the given file is checked out and exclusively locked by another user.
The Microsoft Jet database engine cannot open the file '<file name>'. It is already opened exclusively by another user, or you need permission to view its data.	Ensure that the specified file is not currently in use / open by any other application or user. Close the file and try again (or) close and re-launch SPListX

	application.
The 'Microsoft.ACE.OLEDB.12.0' provider is not registered on the local machine.	Ensure that the machine running SPListX has either Microsoft Office 2007 Suite or Office 2007 System Driver (Data Connectivity Components) installed.
Export Condition failed	Ensure that the specified column in export condition exists in the source SharePoint List.
Ignored Export Condition not satisfied	The list / folder / list item do not satisfy the export condition specified in the task settings. SPListX will log this message in the Activity log and the list / folder / list item will be skipped for export.
Cannot export the column '<Column name>' values, since the column could not be found in the SharePoint List"	Ensure that the specified column in export metadata for specific columns exists in SharePoint List.
Search Condition failed	Ensure that the specified managed property in search condition exists in the source SharePoint service provider.
Cannot export the view '<View name>' values, since the view could not be found in the SharePoint List"	Ensure that the specified view exist in SharePoint List.
Search Condition failed	Ensure that the specified managed property in search condition exists in the source SharePoint Service Provider.
Unable to export membership information for the following SharePoint Group(s): <group list>	The user account specified to access membership information does not have sufficient permission to retrieve the members of the respective SharePoint Groups.
Unable to export membership information for the following Domain Group(s): <group list>	The user account specified in the Active Directory Profile Manager does not have sufficient permission to retrieve the members of the respective Domain Groups. Specify a different user account if necessary.

6.2 Troubleshooting

If and when a problem arises, please forward the following files to support@vyapin.com to revert back to you with a solution. These files will be available where SPListX is installed.

1) *Error log file - e.g., <Application Data Folder>\SPListX\Log\SPListXErrorLog.txt*

2) *For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under TaskHistory folder.*

a) *Activity log file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\logs\ActivityLog.txt

b) *Error log file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\logs\ActivityErrors.txt

c) *Metadata log file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\logs\MetadataErrors.txt

d) *SPListX error log file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\logs\SPListXErrorLog.txt

e) *Task settings file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\settings\Details.xml

f) *Library settings file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\settings\LibrarySettings.xml

g) *Process details file - e.g., <Application Data Folder>*\SPListX\TaskHistory\SPListX Task\20130123-183919\settings\ListItemProcessCount.xml

NOTE: The <Application Data Folder> is the common area where SPListX tasks and task history will be stored in the machine running SPListX application. The <Application Data Folder> can be found from the **Help -> About** screen. The default path of <Application Data Folder> is as follows:

- Windows Server 2003 - C:\Documents and Settings\All Users\Documents
- Windows 8 / 7, Windows Server 2012 / 2008 - C:\Users\Public\Documents

6.3 How to Uninstall SPListX?

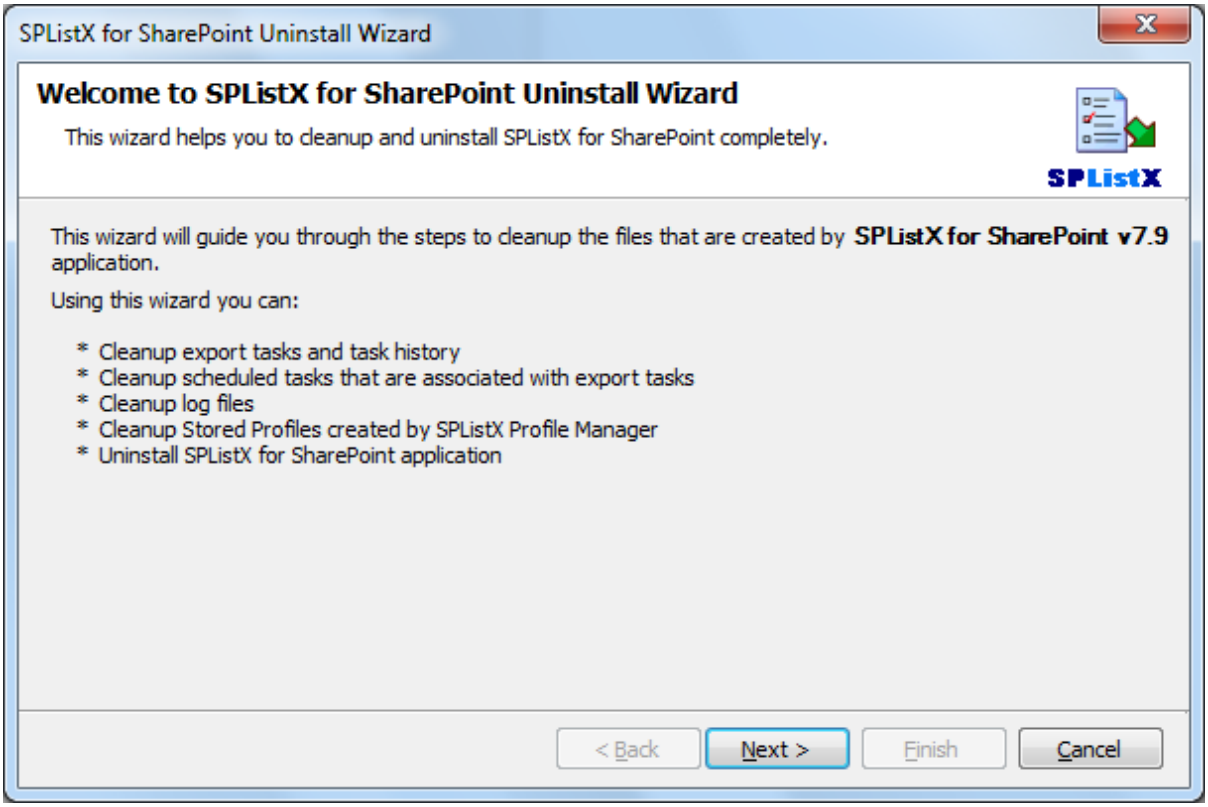
When you create SharePoint export tasks in SPListX, the application creates Windows Scheduled Tasks (to run the export tasks at the specified time interval) where SPListX is installed. Export task results for every task run instance is also maintained in the computer as application files.

When you uninstall SPListX through Control Panel - Add / Remove Programs applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by SPListX remain in the computer. In order to remove SPListX worker files completely, the uninstall wizard provides a set of cleanup options to perform the cleanup operation based your selection.

Use this wizard to cleanup the files that are created by SPListX for SharePoint application selectively and uninstall SPListX completely from the machine.

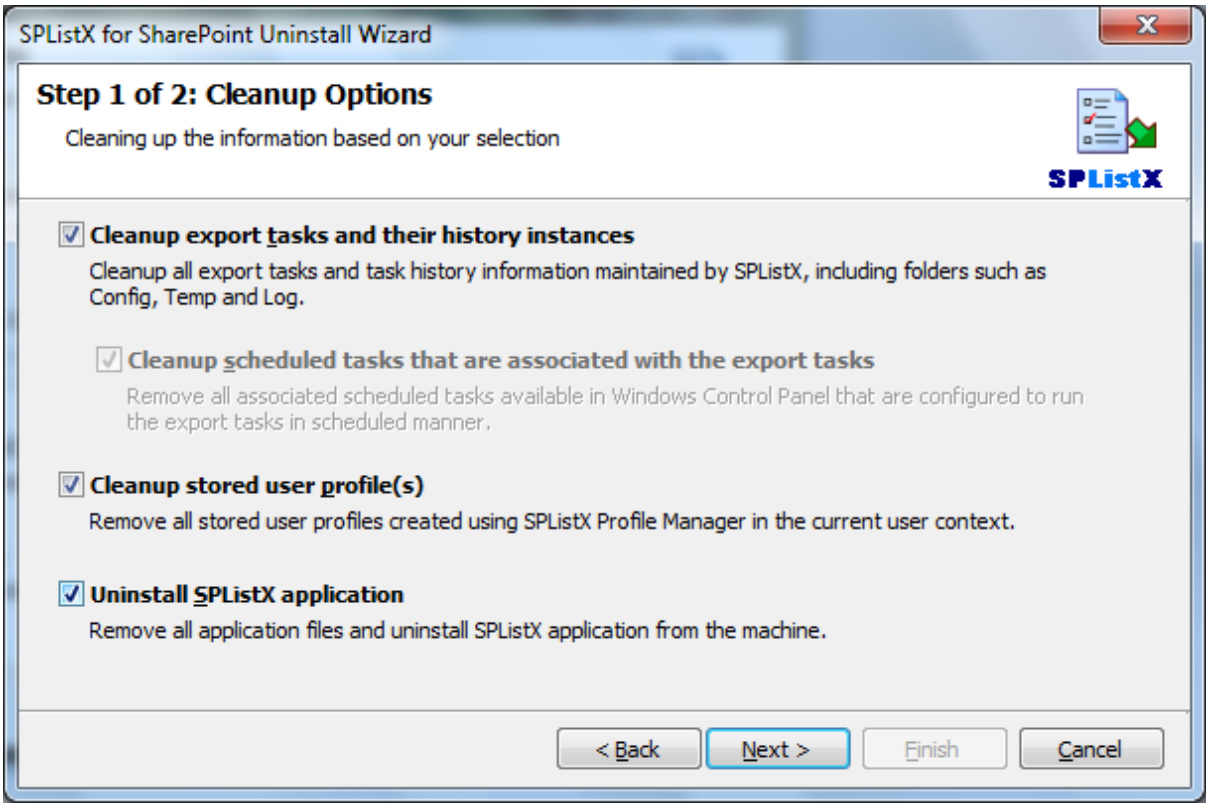
1) **Launch the uninstall wizard by clicking Start** -> Programs -> SPListX for SharePoint -> SPListX Uninstall Wizard.

   The **SPListX Uninstall Wizard** dialog will be shown as below:


SPListX for SharePoint Uninstall Wizard
Welcome to SPListX for SharePoint Uninstall Wizard
This wizard helps you to cleanup and uninstall SPListX for SharePoint completely.
SPListX
This wizard will guide you through the steps to cleanup the files that are created by SPListX for SharePoint v7.9 application.
Using this wizard you can:
* Cleanup export tasks and task history
* Cleanup scheduled tasks that are associated with export tasks
* Cleanup log files
* Cleanup Stored Profiles created by SPListX Profile Manager
* Uninstall SPListX for SharePoint application
< Back
Next >
Finish
Cancel

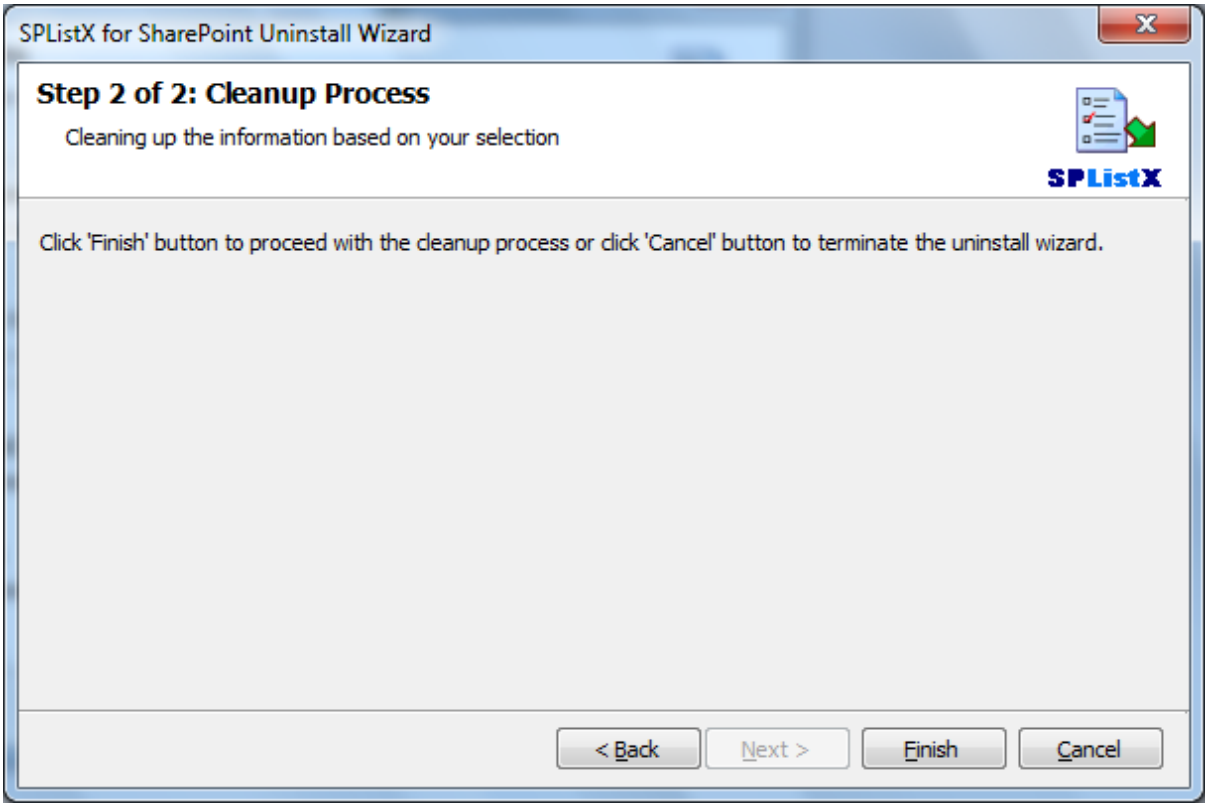
Click **Next** to proceed.

2) Select required **cleanup options** as shown below:


SPListX for SharePoint Uninstall Wizard
Step 1 of 2: Cleanup Options
Cleaning up the information based on your selection
SPListX
Cleanup export tasks and their history instances
Cleanup all export tasks and task history information maintained by SPListX, including folders such as Config, Temp and Log.
Cleanup scheduled tasks that are associated with the export tasks
Remove all associated scheduled tasks available in Windows Control Panel that are configured to run the export tasks in scheduled manner.
Cleanup stored user profile(s)
Remove all stored user profiles created using SPListX Profile Manager in the current user context.
Uninstall SPListX application
Remove all application files and uninstall SPListX application from the machine.
< Back
Next >
Finish
Cancel

Click **Next** to proceed.

3) Confirm the **cleanup** and/or **uninstall process.**


SPListX for SharePoint Uninstall Wizard
Step 2 of 2: Cleanup Process
Cleaning up the information based on your selection
SPListX
Click 'Finish' button to proceed with the cleanup process or click 'Cancel' button to terminate the uninstall wizard.
< Back
Next >
Finish
Cancel

Click **Finish** to run cleanup and/or uninstall process. Click **Cancel** to close the wizard.

4) Once the file cleanup process is complete, the uninstall wizard will automatically run Windows Installer program to remove SPListX application from the machine, if you have selected the cleanup option **Uninstall SPListX application** in the wizard.